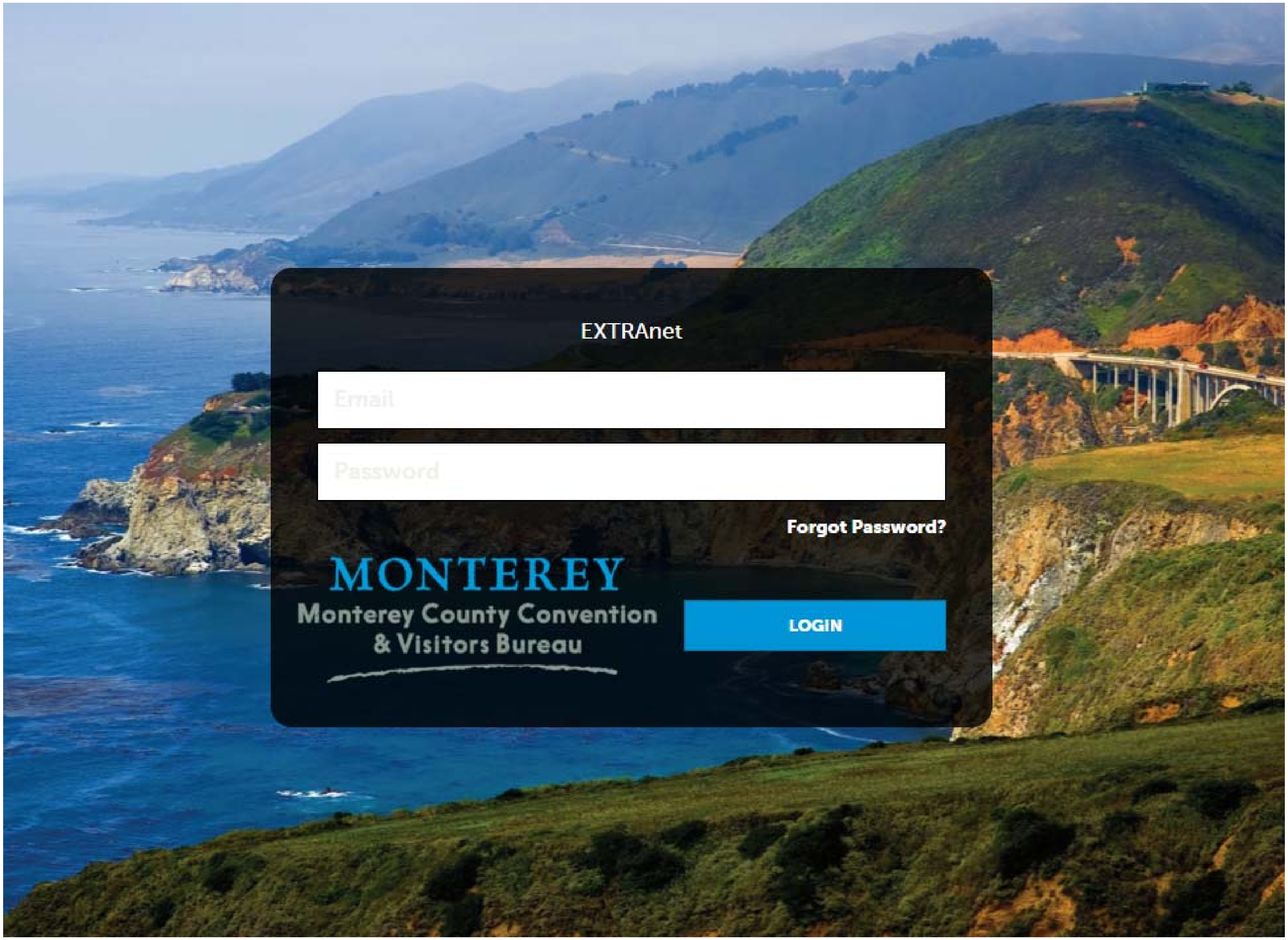
MONTEREY

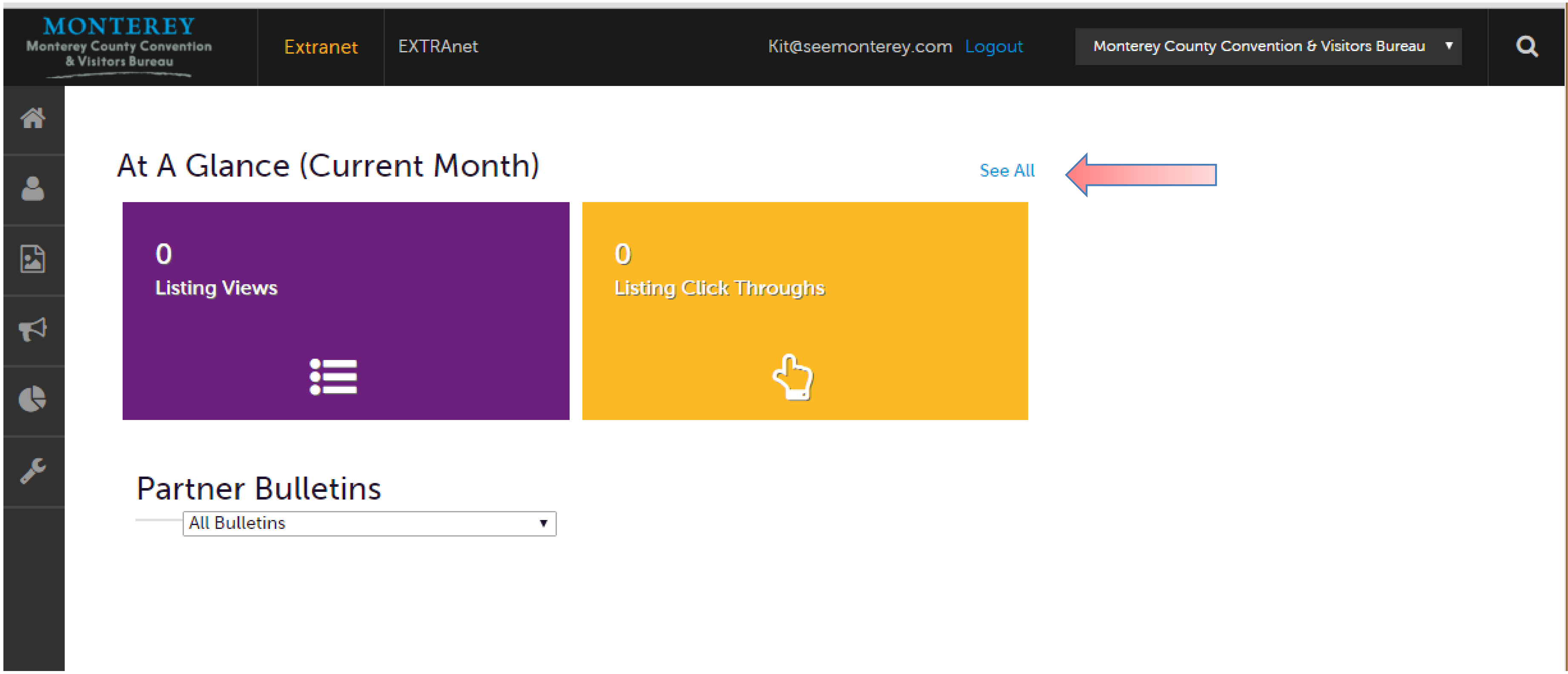
Monterey County Convention & Visitors Bureau

EXTRAnet 4.0 User Instructions

Login Screen

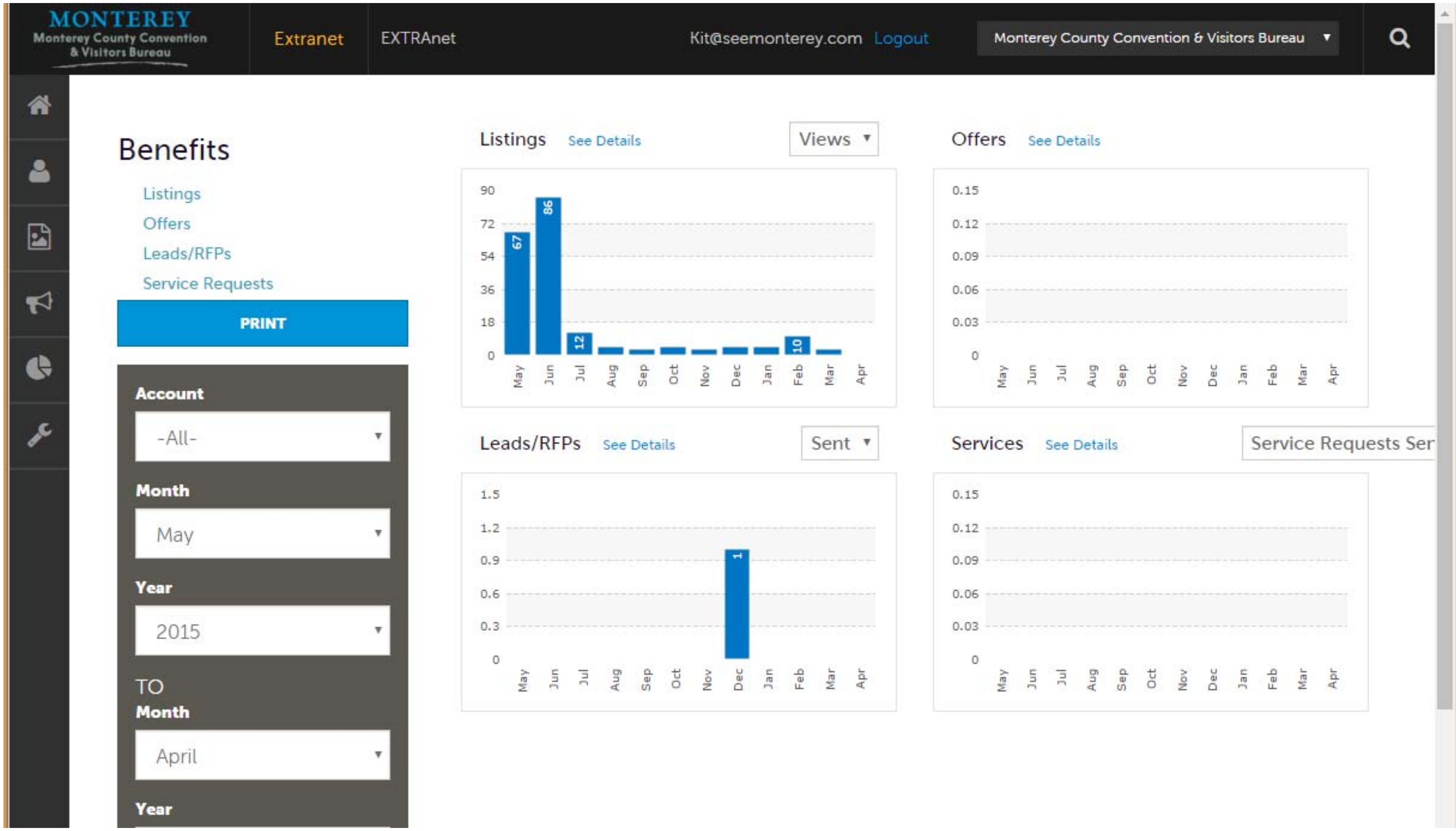


Home Screen – 4.0

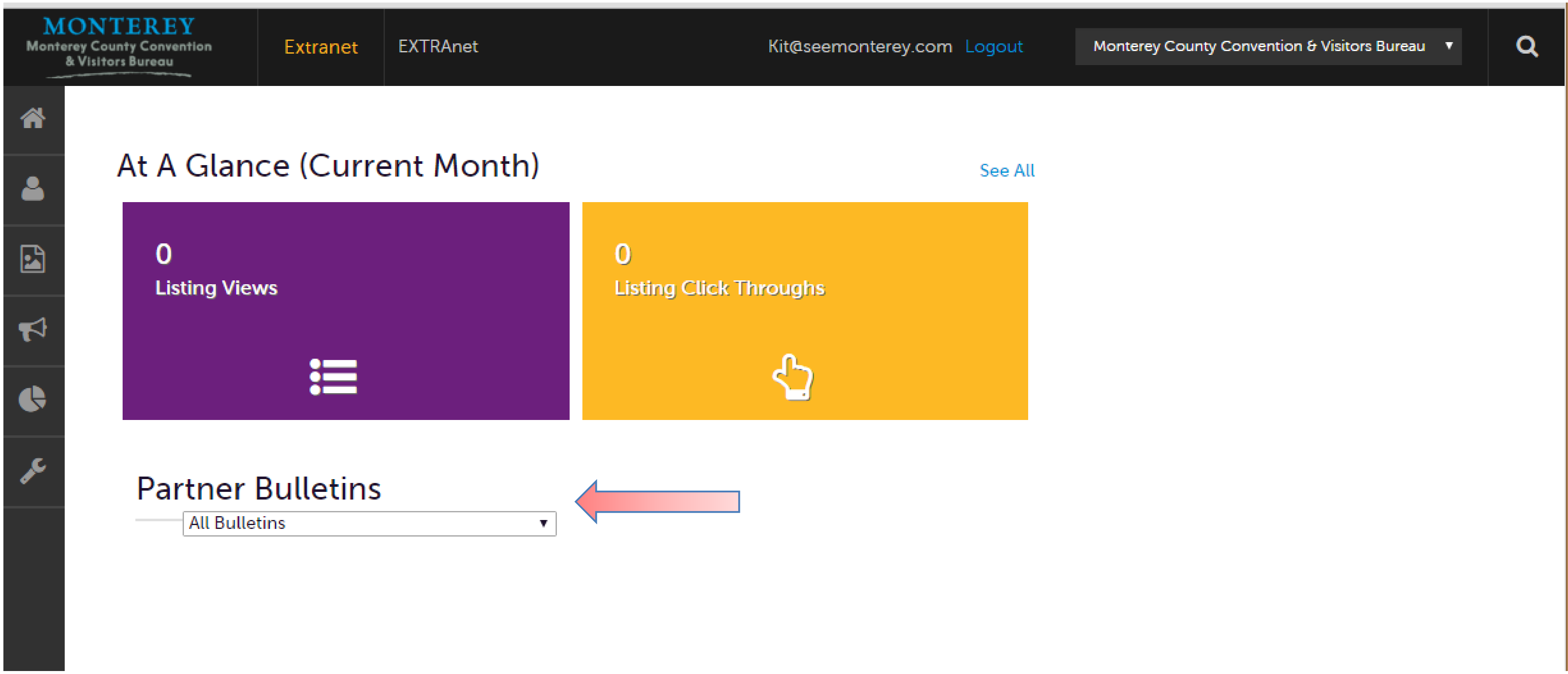


At A Glance is a brief view of an Account's listings tracking. Clicking on the **See All** link to the right, engages a more detailed view of the Account and its interactions with the Bureau.

Home Screen (cont'd)

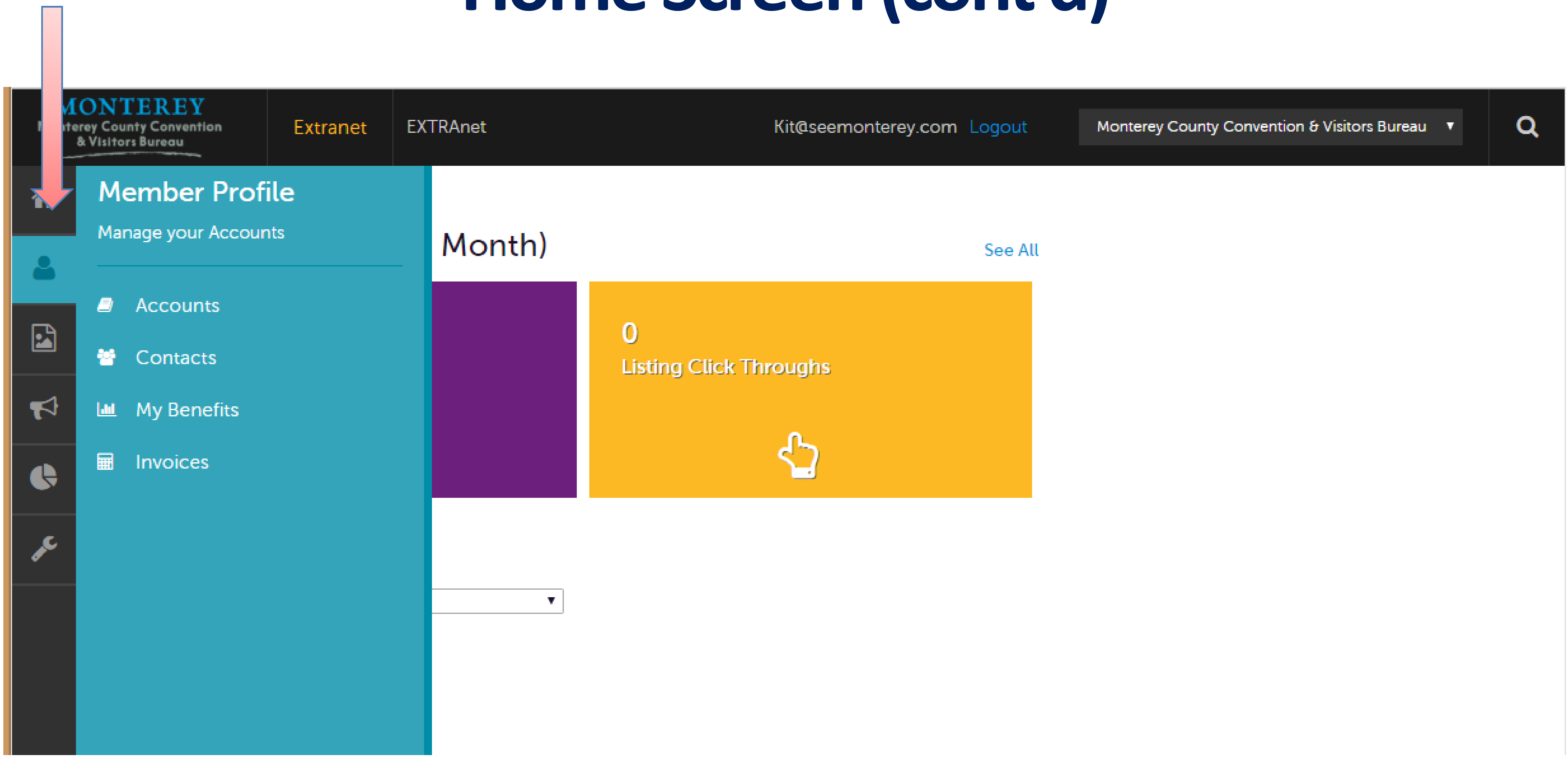


Home Screen (cont'd)



Partner Bulletins are important notices, documentation, events, etc. posted by the Bureau. Important bulletins will be marked with a blue and white exclamation mark.

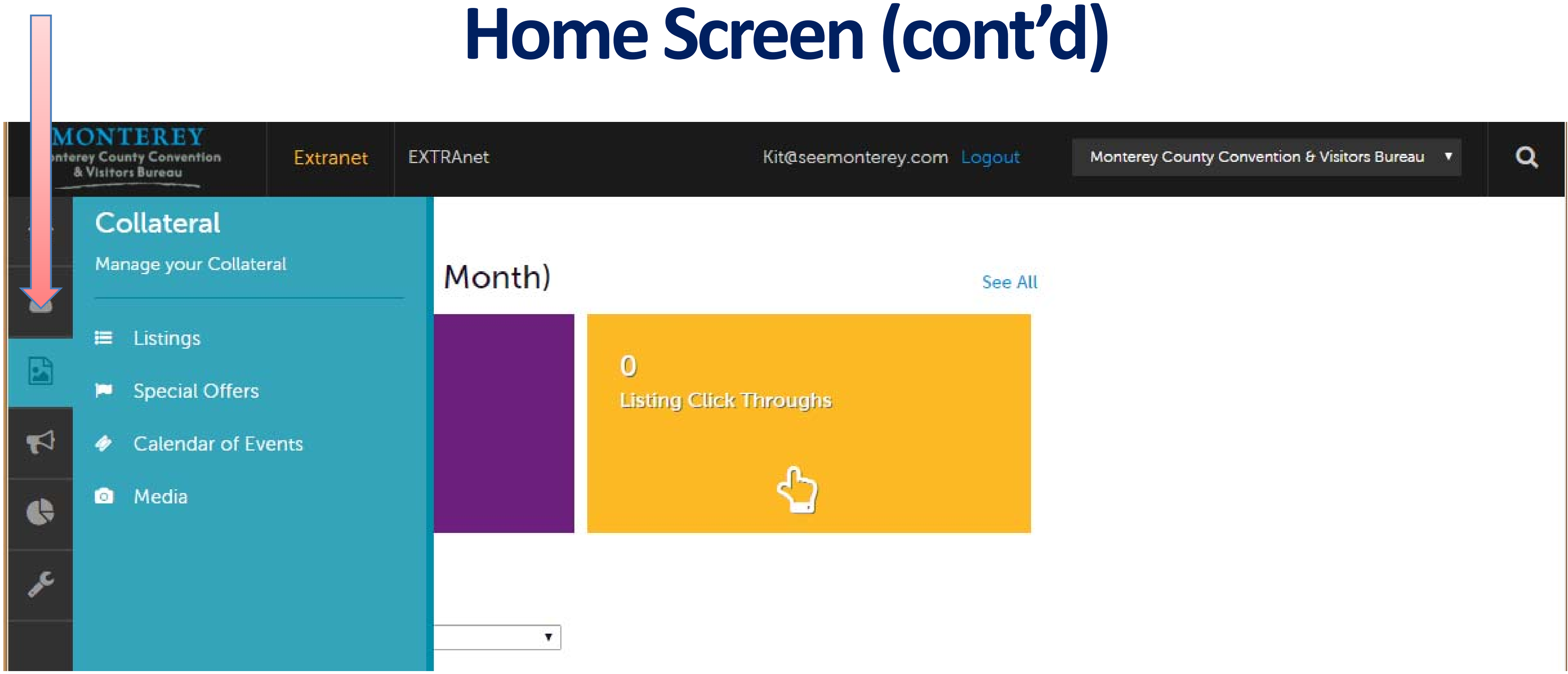
Home Screen (cont'd)



Clicking the **Member Profile** icon displays the Accounts information, such as contacts, Account details and information about interaction with the Bureau (same as the See All link in the At A Glance section), in addition to invoices sent by the Bureau.

<u>Note</u>: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.

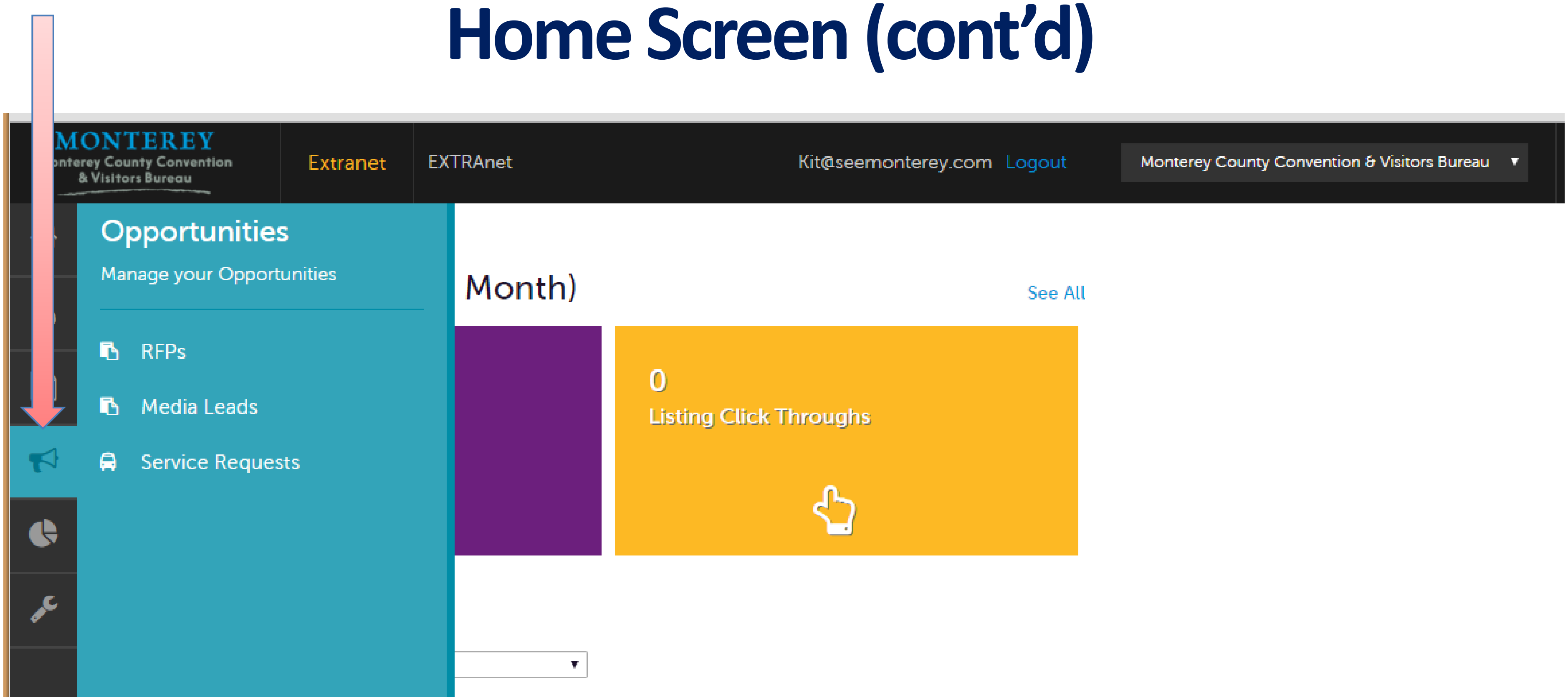
Home Screen (cont'd)



Clicking the **Collateral** icon, displays options for listings, special offers, calendar of events, and media (i.e. images).

<u>Note</u>: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.

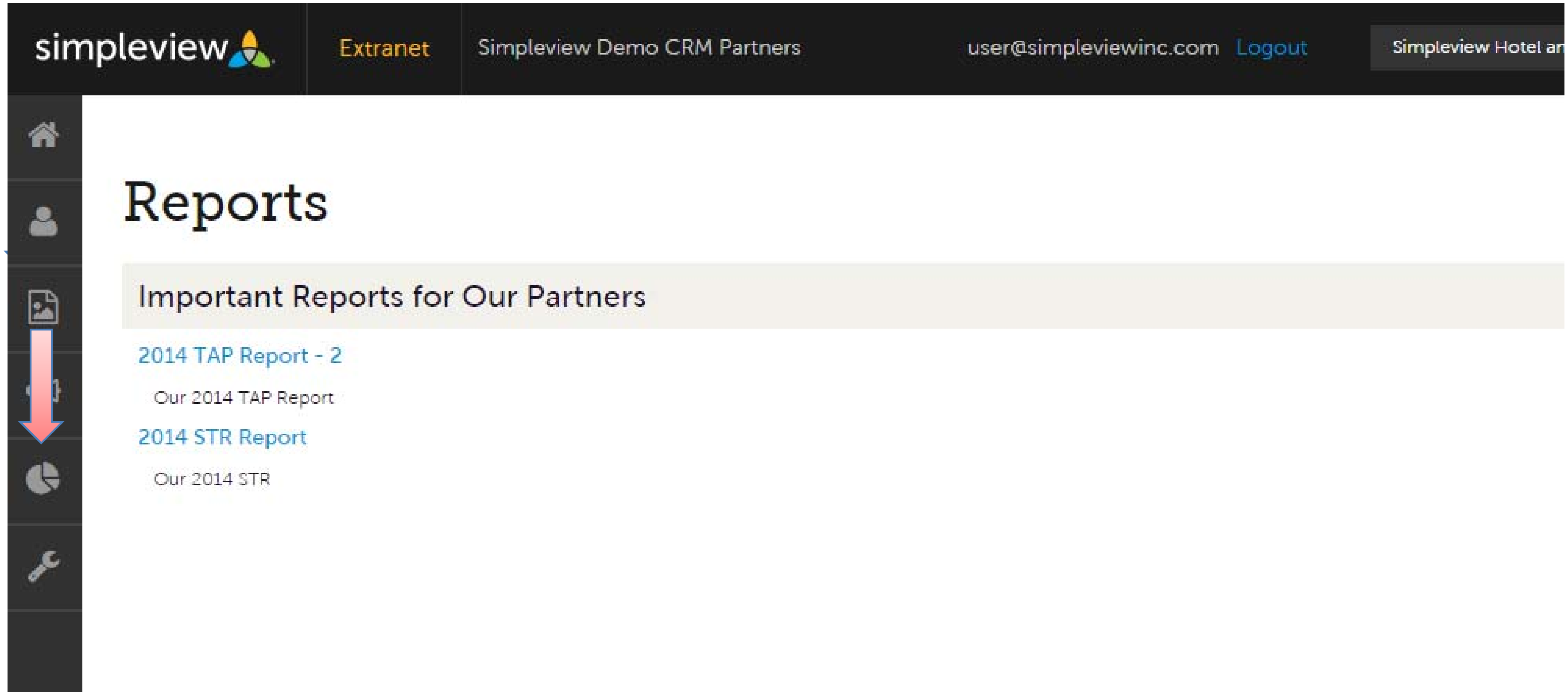
Home Screen (cont'd)



Clicking the **Opportunities** icon, displays options for RFPs sent by the Bureau. Opportunities are broken into RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs).

More on these options later in the presentation.

Home Screen (cont'd)



By clicking the **Reports** icon, displays reports the Bureau has posted. To view a report just click the name of the report.

Filters and Data Grids

Let's take some time to discuss settings that can be customized by each user for themselves in the EXTRAnet.

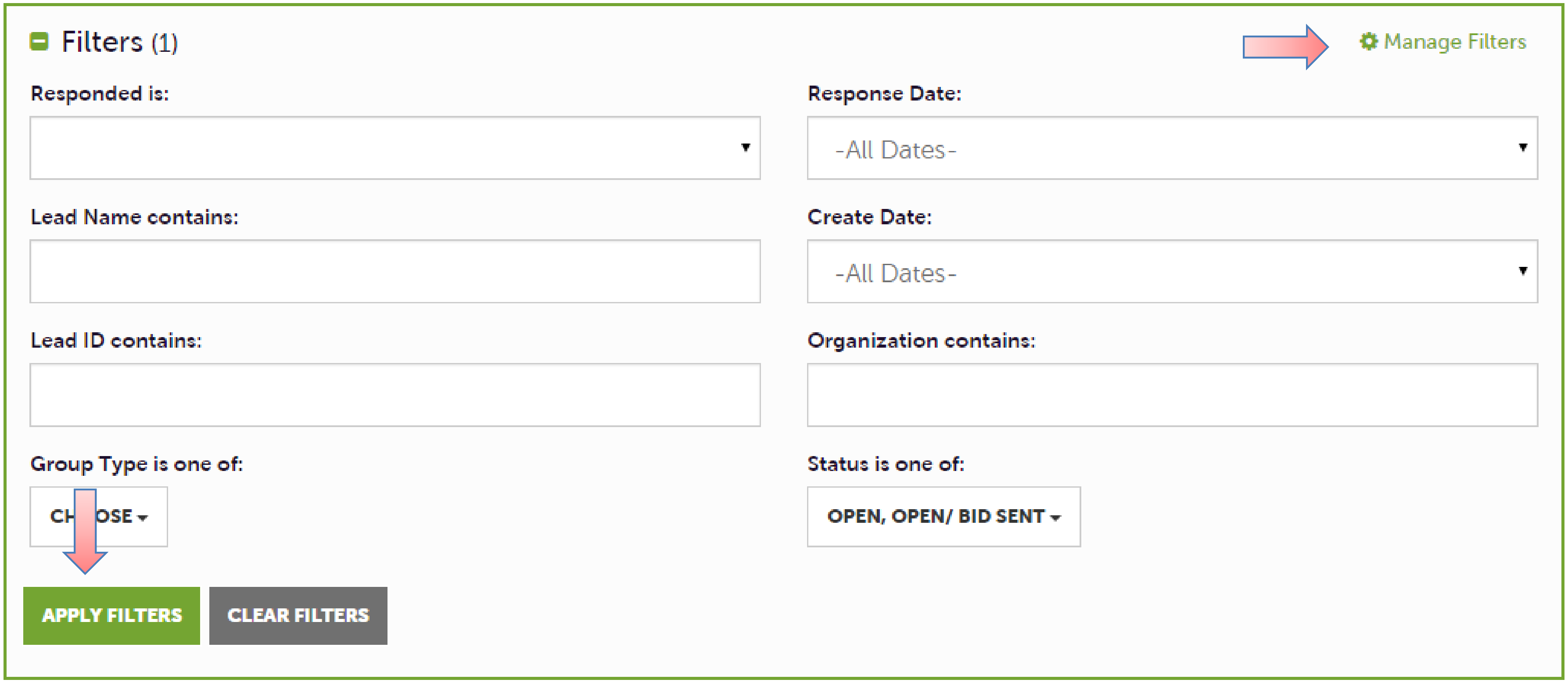
1. **Filters** – Several pages of the EXTRAnet will contain a Filters section. This section allows you to narrow down the results displayed on the page. The default filters can be adjusted by clicking the **Manage Filters*** option in the top right corner of this section.

2. **Data Grids** – When viewing pages with filter options, just below the filters is a data grid. This data grid will display a list of records matching the criteria specified in the filters. Each default column heading in a data grid can be modified by clicking the **sprocket*** icon in the top right corner of the grid.

* Remember, any adjustments made with the **sprocket** or the **Manage Filters** apply only to the person making the changes.

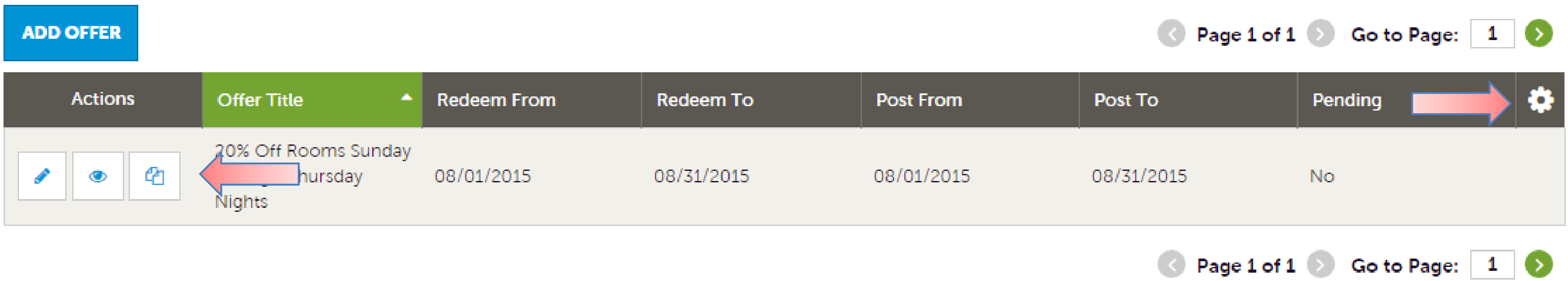
Filters and Data Grids

RFPs



Here is an example of the RFPs filter page. Once the desired criteria have been set in the filters, click the **Apply Filters** button to see the results. Notice the **Manage Filters** button that was mentioned previously.

Filters and Data Grids (cont’d)



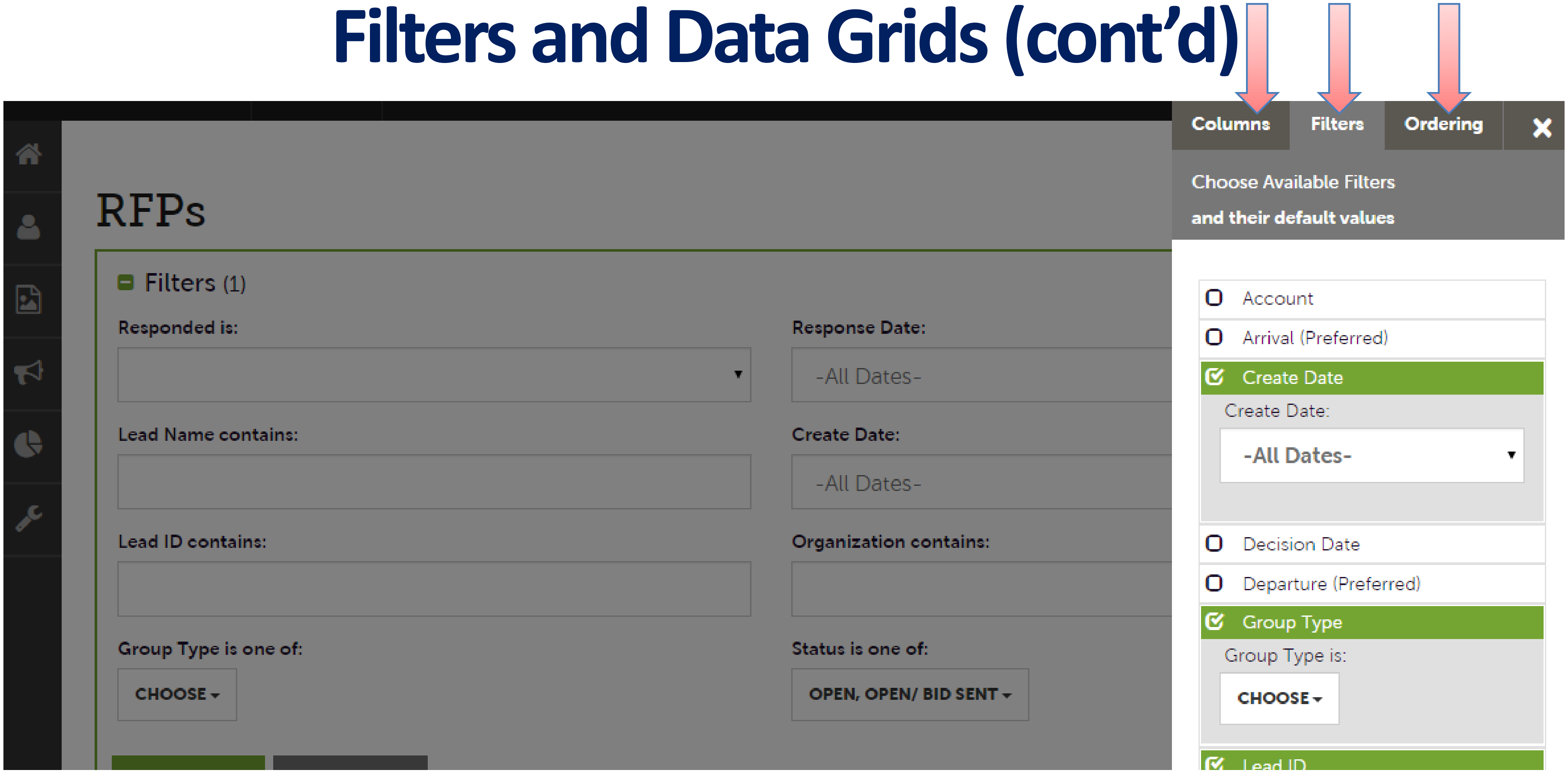
Once the filters have been applied, the data grid will update with the matching results. Several icons may appear on the records within the grid. The appearance of these icons will depend on the page being viewed.

These icons are:

1. **Pencil** – allows editing of a record
2. **Eyeball** – allows viewing of a record
3. **Clone** – allows duplicating of a record
4. **Add Button** - Depending on the page, an Add button may appear in the top left of the data grid. When this option is available, clicking allows the addition of a new record.

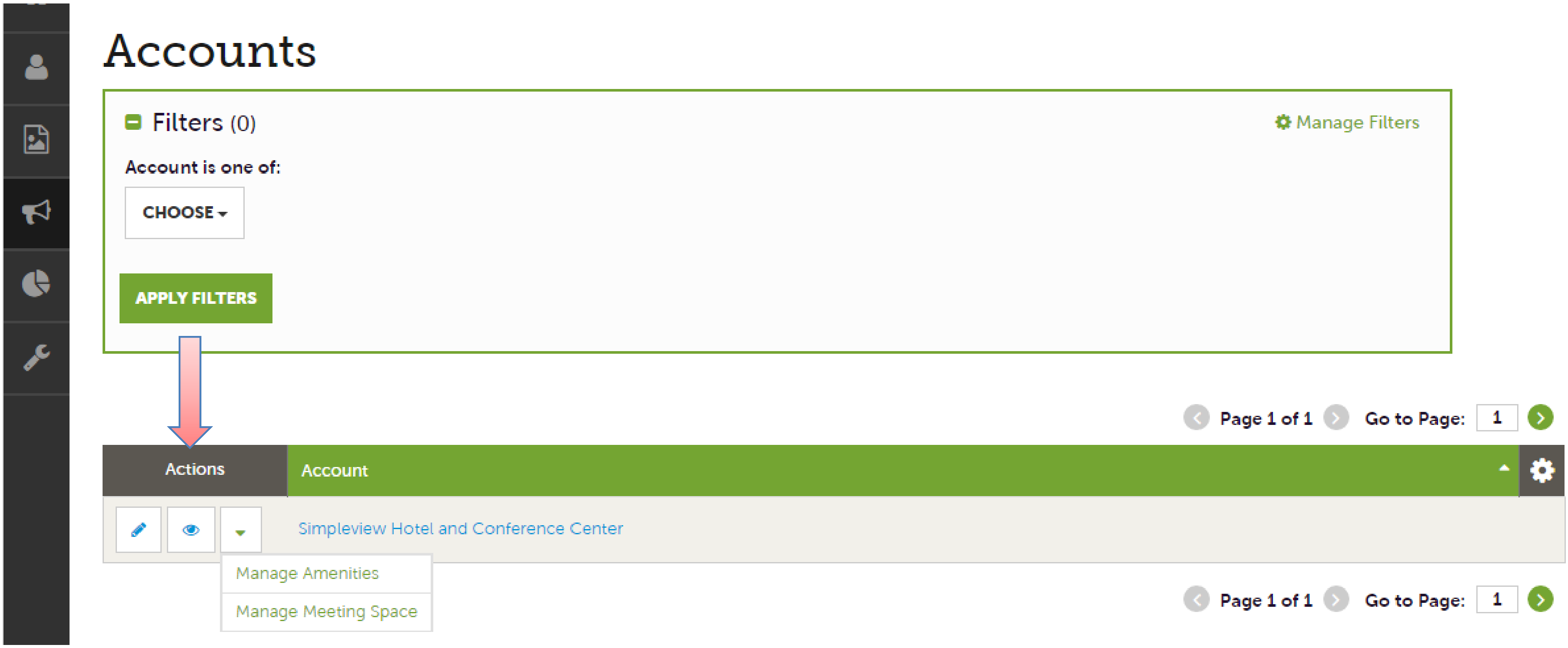
   Notice the **sprocket** icon that was mentioned previously.

Filters and Data Grids (cont'd)



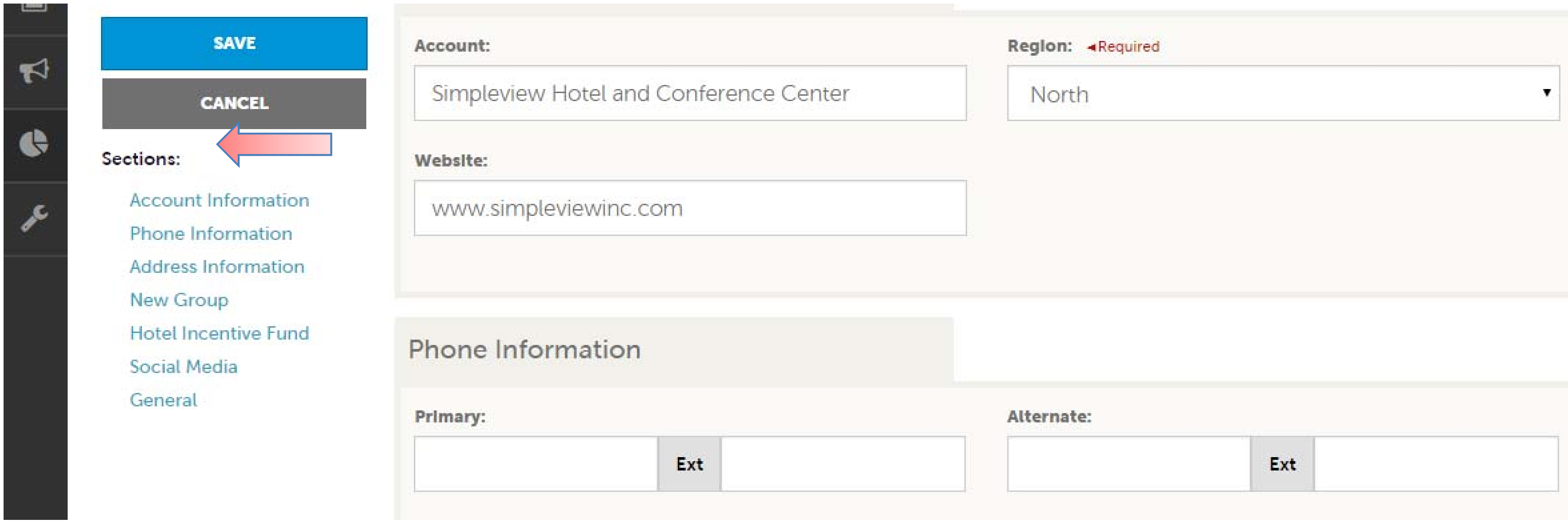
Clicking on the **sprocket** icon or the **Manage Filters** button will trigger a menu as shown here. This menu provides options for personalizing the filters, data grid columns, and the ordering in which each column appears. By changing these options, changing of these options effects ONLY the person making the changes.

Manage Profile - Accounts



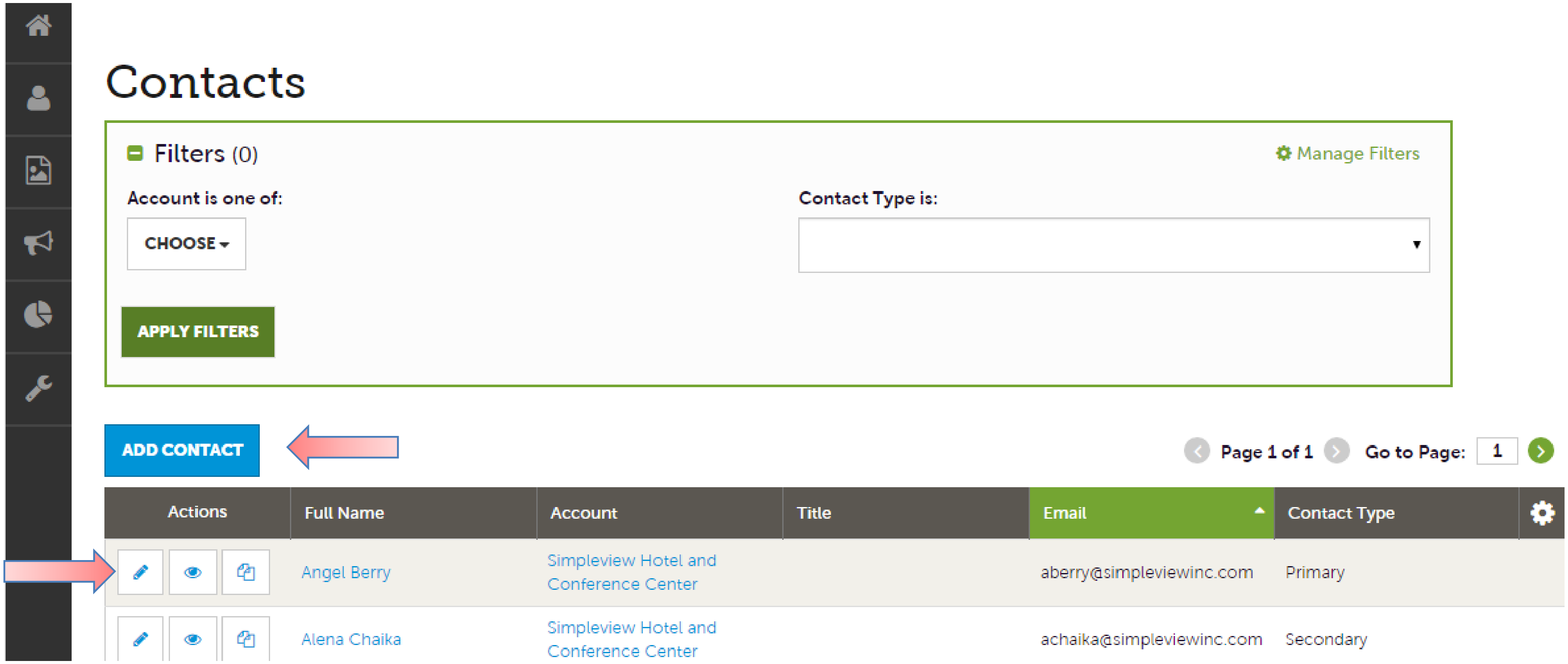
After you click the Profile icon and then Accounts, you will be presented with your Account name and various actions you can perform. If you see multiple Account names, this is due to your contact Login ID and password being associated with another Account. The pencil icon will allow you to edit your Account information. By clicking the eyeball icon, you can view your Account information. The down arrow icon will allow you to view and edit your amenity and meeting space information.

Manage Profile - Accounts (cont'd)



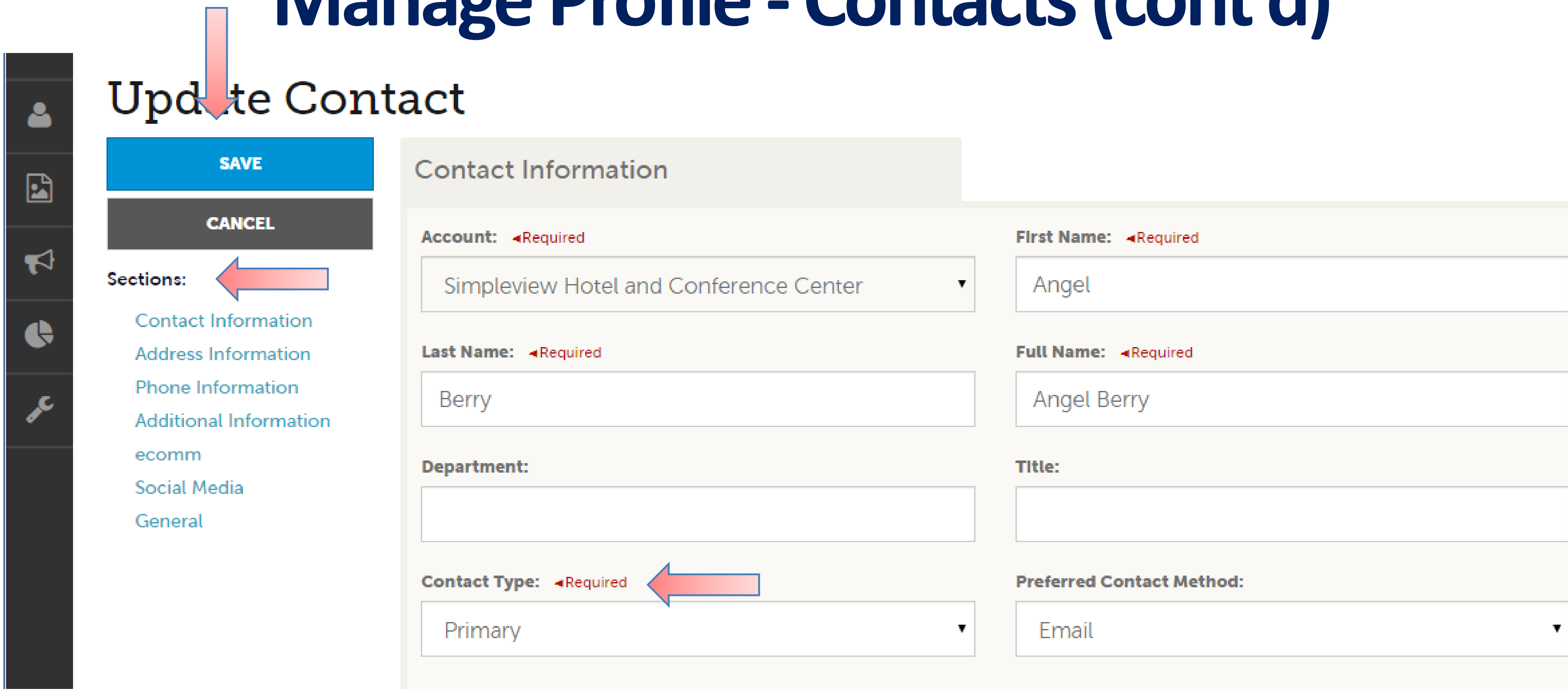
When you view or edit your Account information, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing the Account , the top left will display an Edit button. If you are editing the Account , the top left will display a Save button. You must click the Save button before changes are applied!

Manage Profile - Contacts



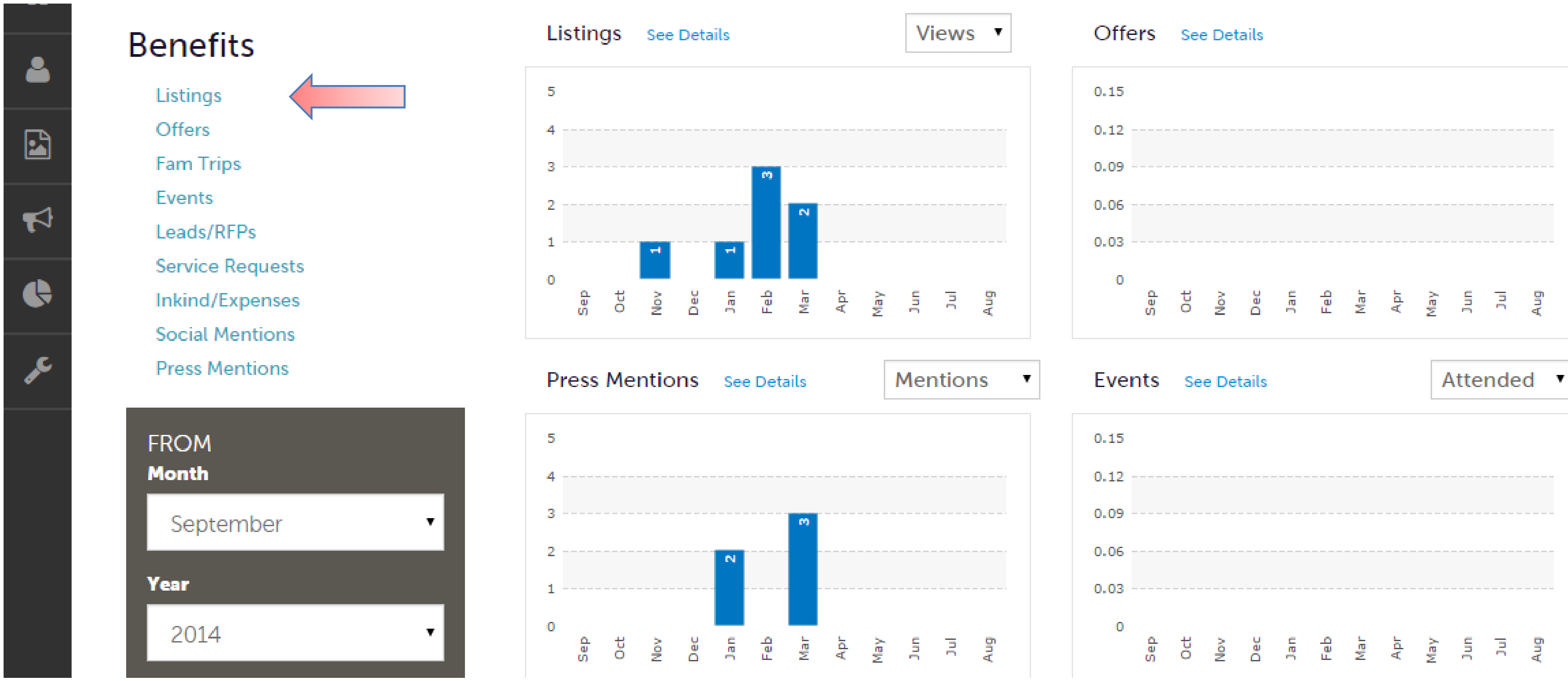
After you click the Profile icon and then Contacts, you will be presented with a list of all the contacts associated with your Account. On this page you can Add, Edit, View, or Clone (i.e. duplicate) a contact depending upon your EXTRAnet permissions.

Manage Profile - Contacts (cont'd)



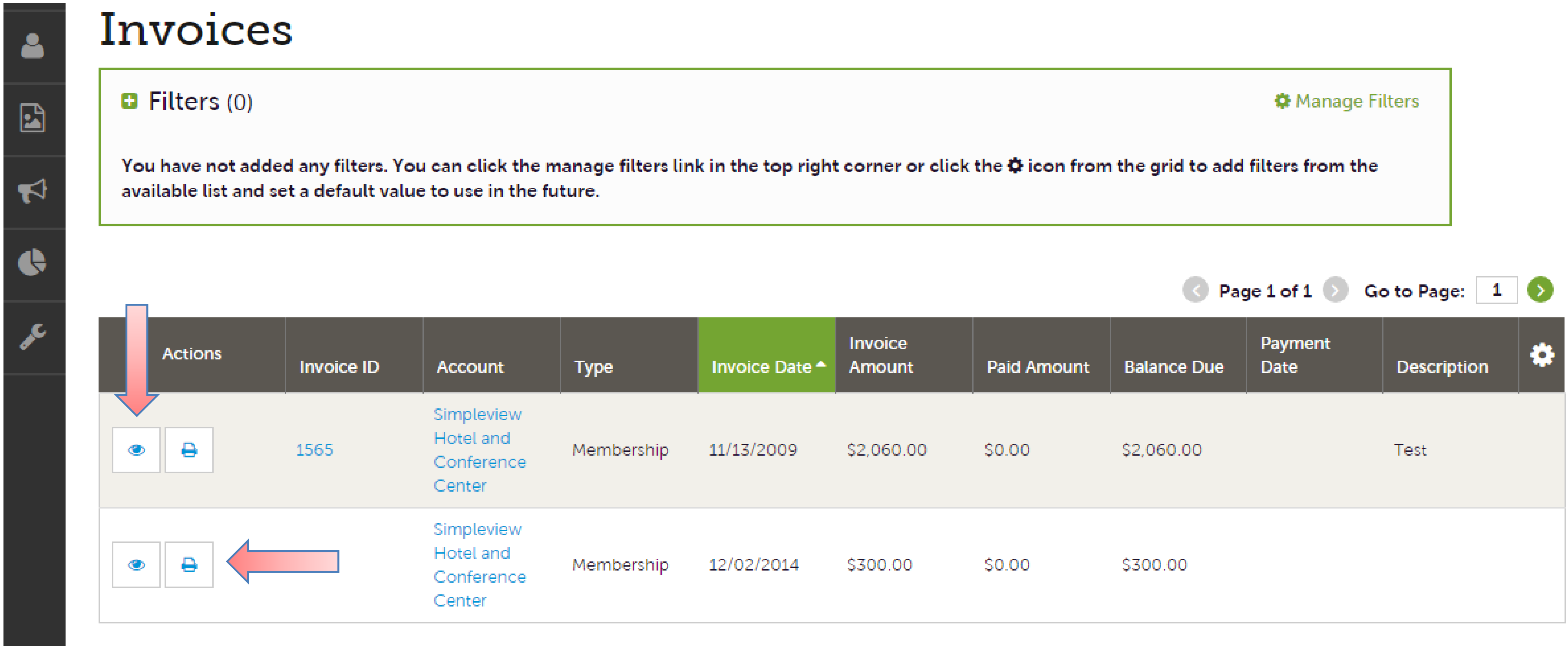
When you view or edit a contact, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a contact, the top left will display an Edit button. If you are editing a contact, the top left will display a Save button. You must click the Save button before changes are applied!
<u>IMPORTANT NOTE</u>: If a contact has left your business, it is your responsibility to notify the Bureau and/or change their contact type to "Inactive".

Manage Profile - My Benefits



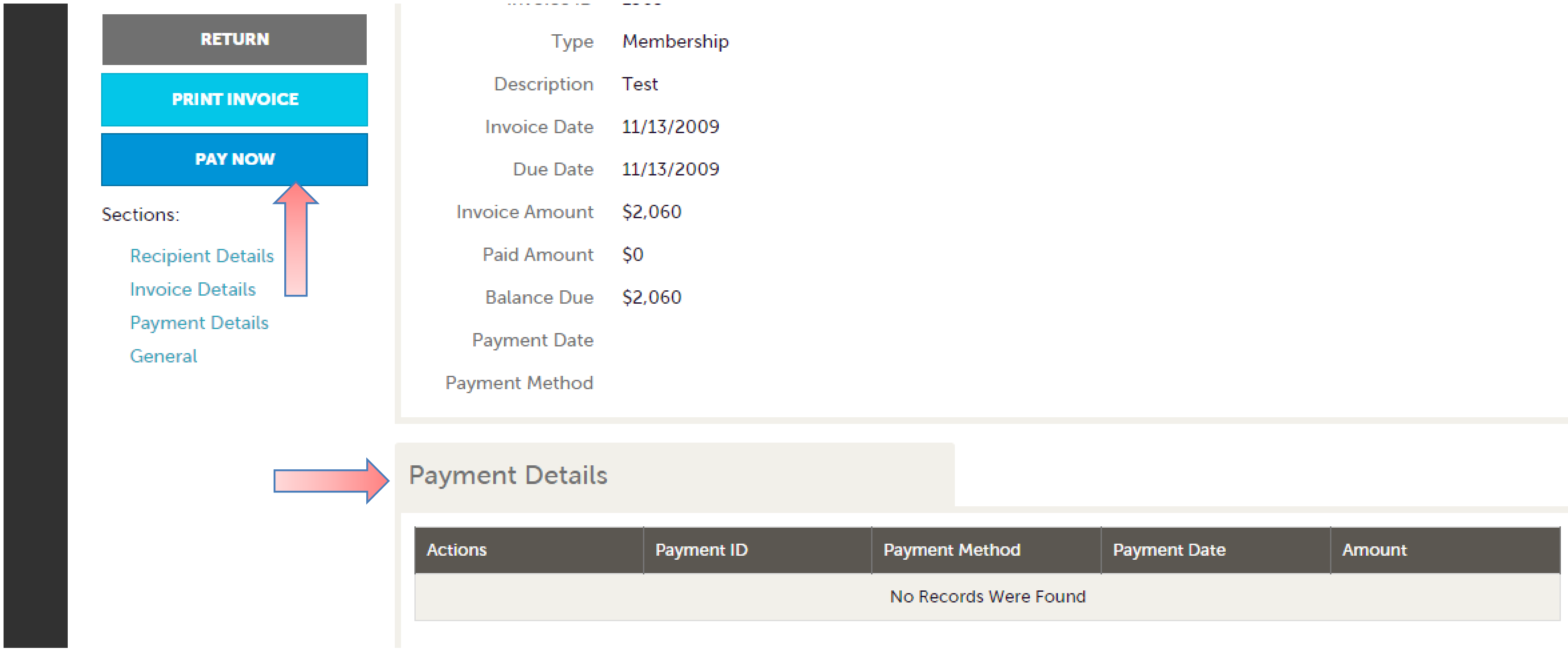
After you click the Profile icon and then My Benefits, you will be presented summary reports based on the Bureau's interaction with your business. The information you see on this page is specifically related to your Account.

Manage Profile - Invoices



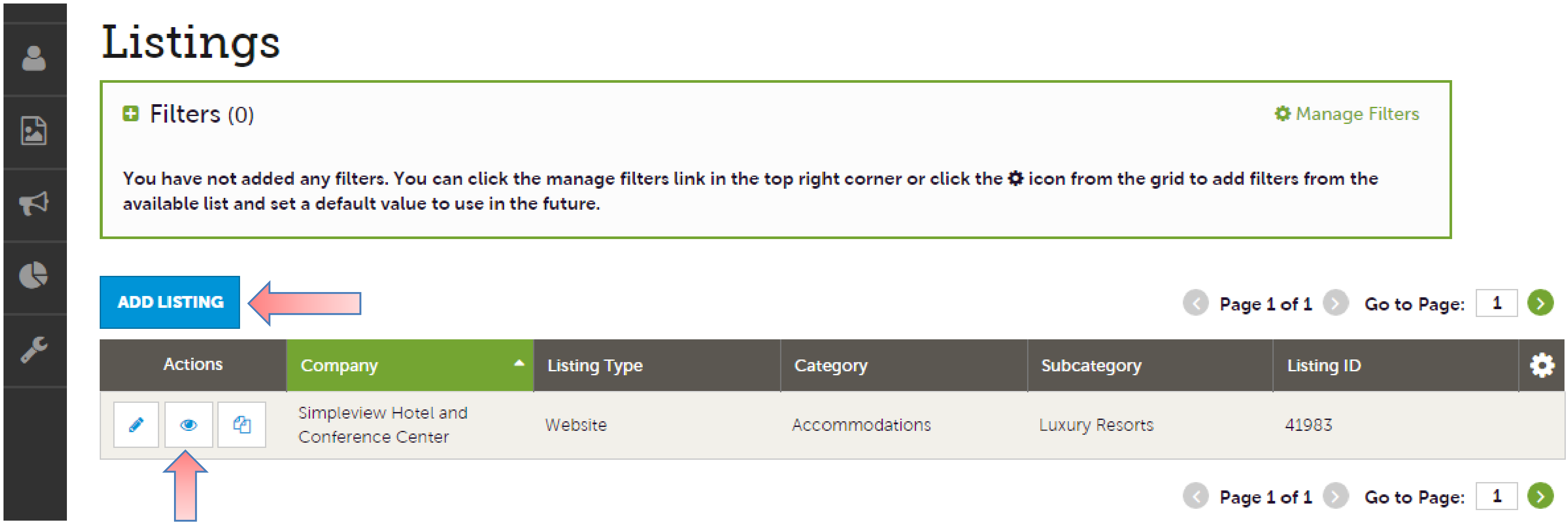
After you click the Profile icon and then Invoices, you will be presented with a list of invoices sent to your Account. To view the details of the invoice you can either click the eyeball icon or the Print icon. To pay an invoice, click the eyeball icon to first view the invoice. You can only pay Membership invoices through the EXTRAnet.

Manage Profile - Invoices (cont'd)



When viewing an invoice you can see the payment history associated to the invoice. If the invoice has an outstanding balance, you will see a Pay Now button in the top left of the page. Clicking the Pay Now button will take you to a secure page to pay using a credit card, much like any online payment portal on the internet.

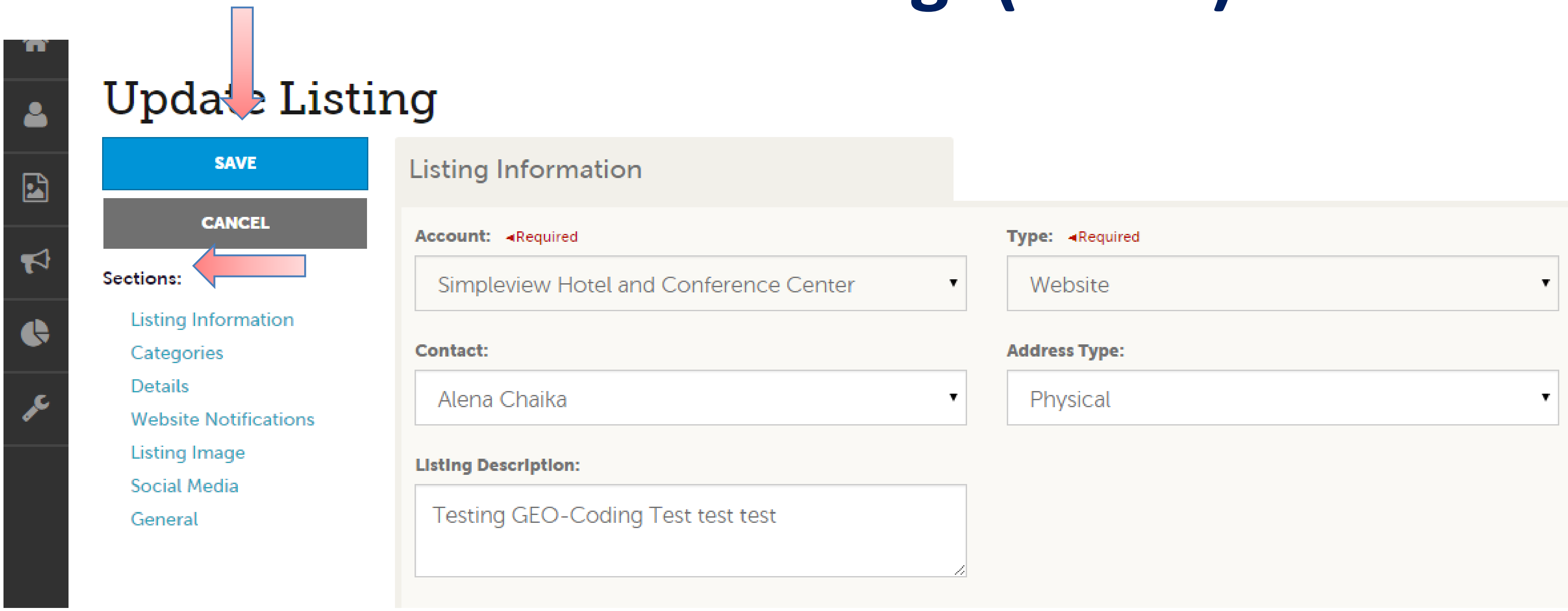
Collateral - Listings



After you click the Collateral icon and then Listings, you will be presented with your business's listings. These listings may be website listings or publication guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information. The clone icon will allow you to duplicate a listing. You can also create a new listing by clicking the Add Listing button.

NOTE: Members can have up to 5 listings (in different categories) on SeeMonterey.com

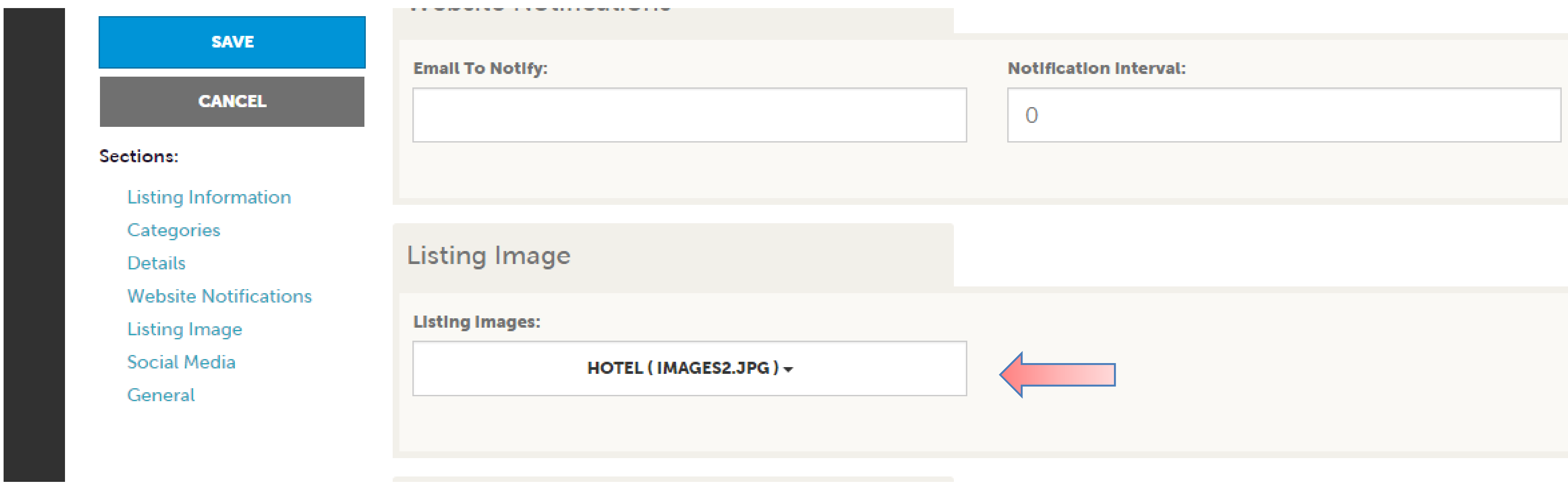
Collateral – Listings (cont'd)



When you view, edit, or add a listing, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a listing, the top left will display an Edit button. If you are editing a listing, the top left will display a Save button. You must click the Save button before changes are applied!

IMPORTANT NOTE: Any edits or adding of listings will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/additions.

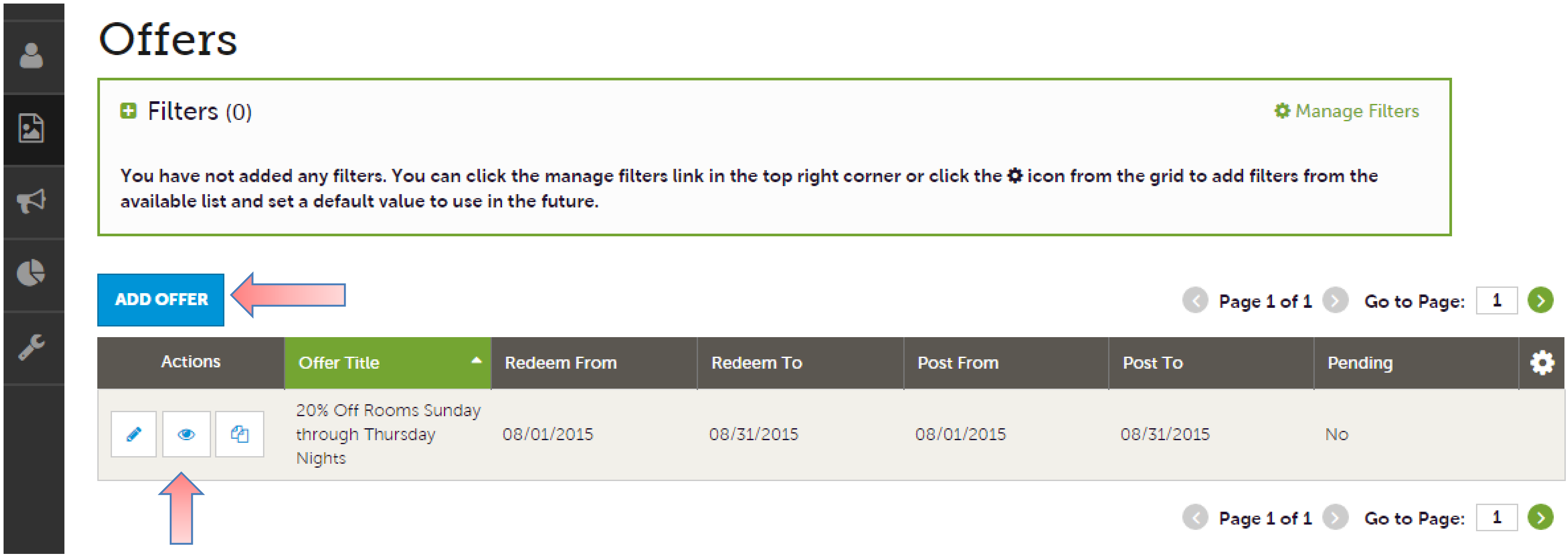
Collateral – Listings (cont'd)



When you edit or add a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. As mentioned previously, any edits or adding of listings will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/additions. More on images in the Collateral – Media slide.

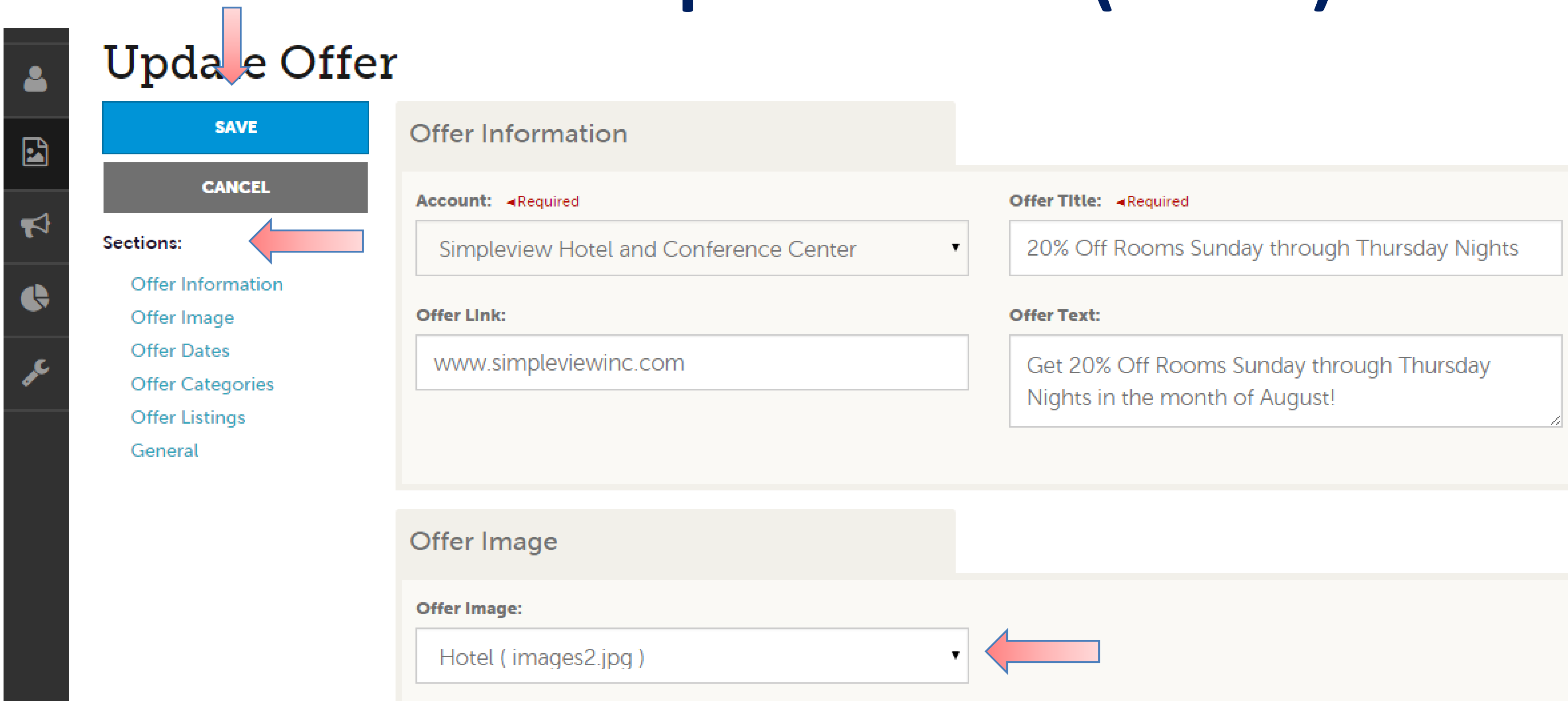
<u>NOTE</u>: Not all listing types allow for images to be added.

Collateral – Special Offers



After you click the Collateral icon and then Special Offers, you will be presented with your business's offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view the existing offer. The clone icon will allow you to duplicate an offer. You can also create a new offer by clicking the Add Offer button. There is no limit to the number of special offers that you have as long as they are open to the public, have a discount or "offering" of some sort and are for valid dates.

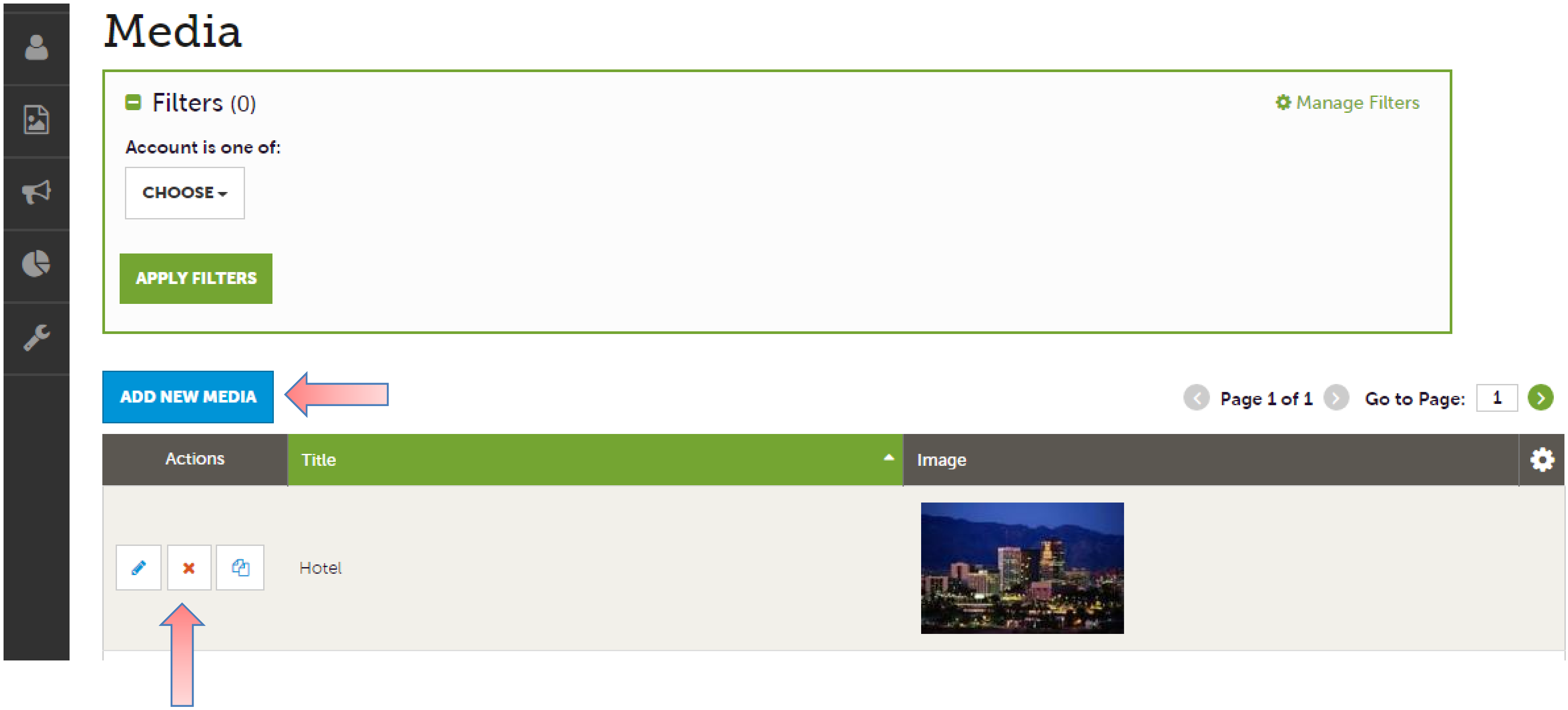
Collateral – Special Offers (cont'd)



When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing an offer, the button in the top left will say Edit. If you are editing an offer, the top left will display a Save button. You must click the Save button before changes are applied! As with listings, you have the ability to attach images to your offers.

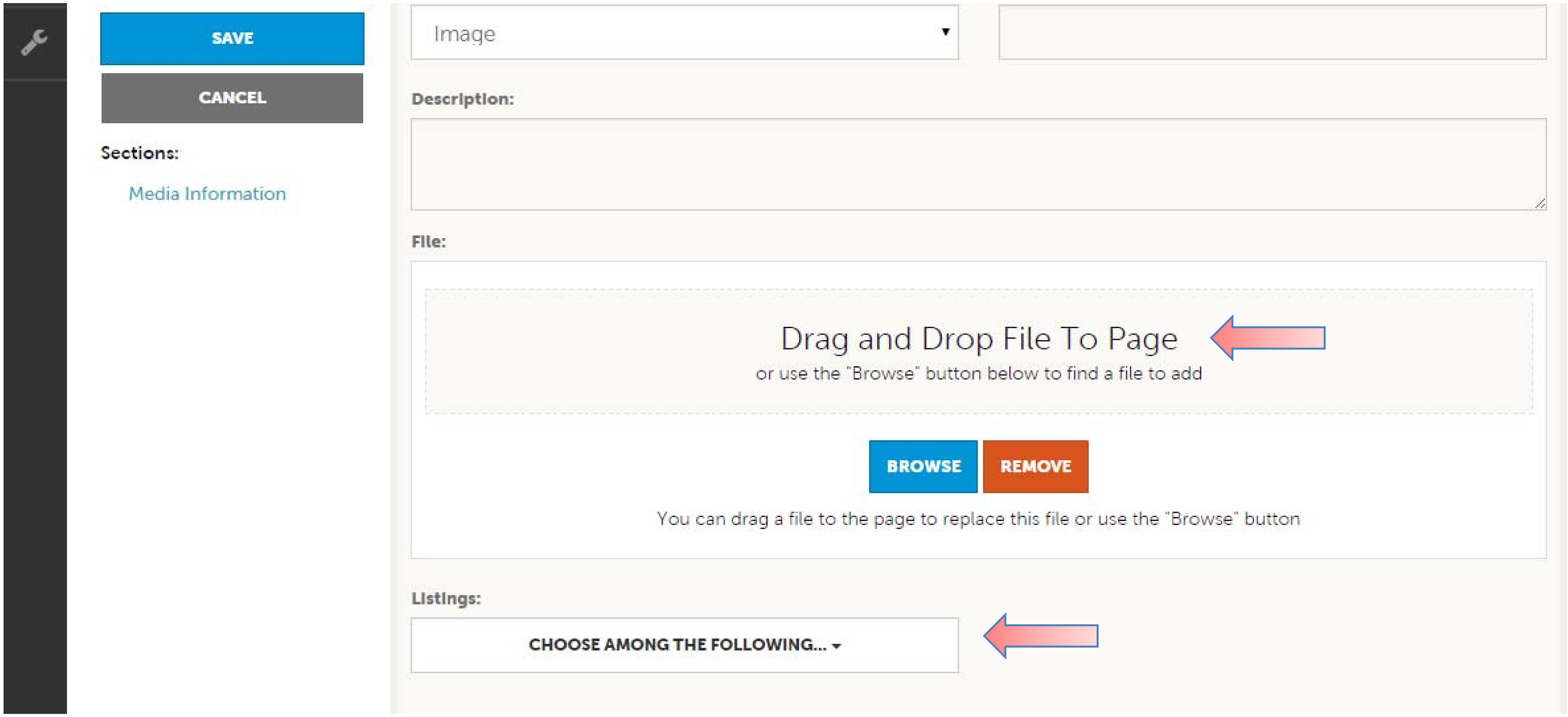
IMPORTANT NOTE: Any edits or adding of offers will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/adds.

Collateral – Media



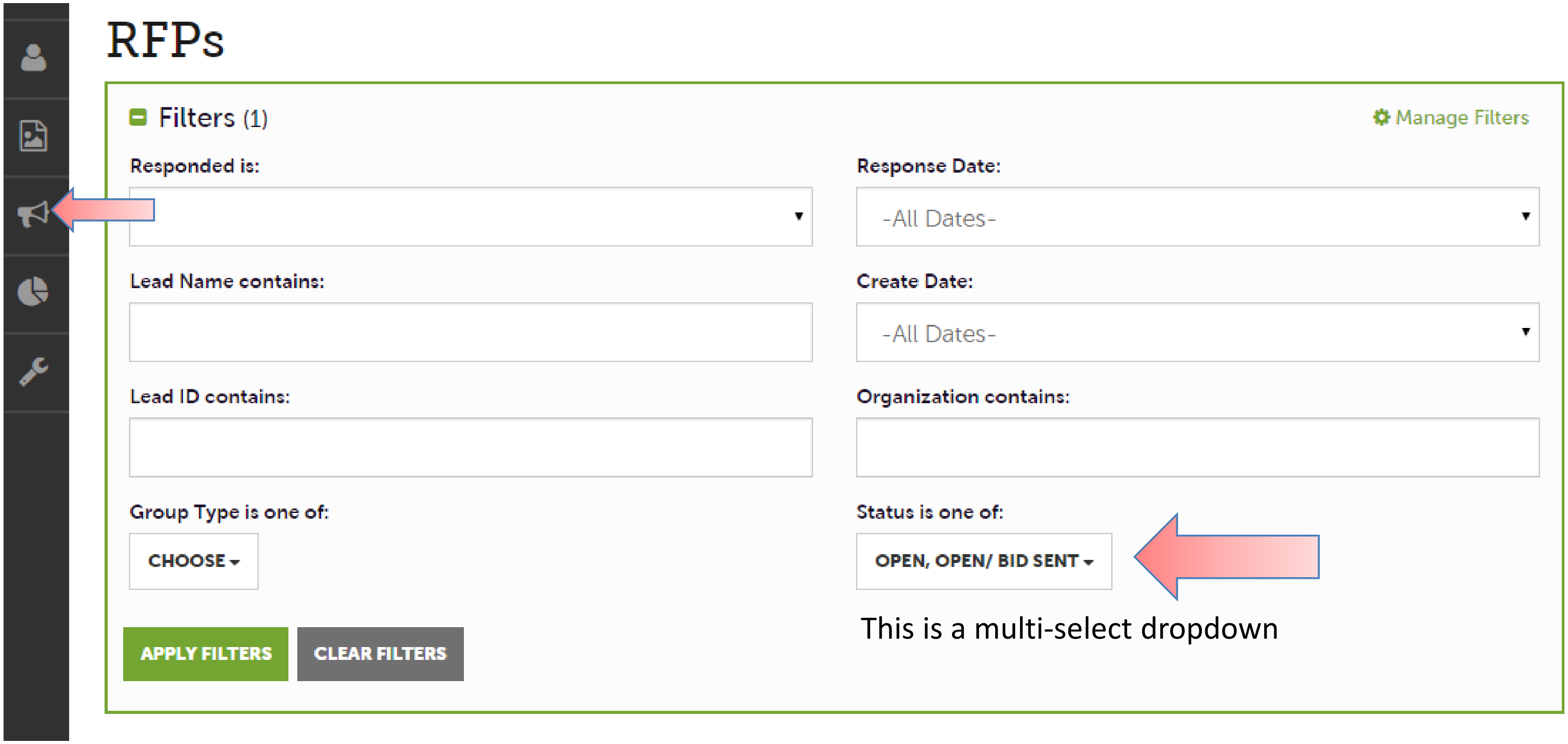
After you click the Collateral icon and then Media, you will be presented with your Account's images available for use on listings and special offers. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image. There is no limit to the number of images that you can upload.

Collateral – Media (Cont'd)



You can browse your hard drive or drag and drop an image. You must upload one image at a time. Once you upload a new image or edit an existing one you can attach the image to one or multiple listings by selecting the Listings pull down menu. Optimal image type is JPG with 300 DPI resolution; pixel size 203w x 142h.

Opportunities – RFPs



After you click the RFP icon and then RFPs, you will be presented with your Account's Sales and Tour Leads. The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the Apply Filters button. By Default, you will see all of your Open Leads and the Opens Leads you have already bid on. For more on Lead statuses and their definitions see the next slide.

Opportunities – RFPs (cont'd)

LEAD STATUS DEFINITIONS

On the EXTRAnet you will see 10 different statuses in which a Lead can be in. These statuses are:

1. Closed / No Bid Sent: These Leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is business your property did not bid on and the response due date has passed.

2. Open: These are Leads in a tentative status that your property has not bid on and the response due date has not passed.

3. Open / Bid Sent: These are Leads in a tentative status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.

4. Turned Down: These Leads can be Tentative, Definite, Lost, or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.

5. Closed / Decision Pending: These are Leads in a tentative status that your property has placed a bid on, but the response due date has passed thus you cannot edit your response.

6. Closed / Lost to Another City: These are Leads you were pursuing, but the business has been lost.

7. Closed Cancelled: These are Leads where you won the business, but the group has cancelled.

8. Closed / Won: These are definite Leads in which your property was selected.

9. Closed / Won - Properties TBD: These are definite Leads but the group has not decided on a hotel yet.

10. Closed Lost: These are definite Leads in which your property was not selected for the business.

Opportunities – RFPs (cont'd)

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016
	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016

Below the filters section, you will see a data grid with all your Leads based on the selected filters. As mentioned in the Filters and Data Grid section of this presentation, you can change these data grid column headings to your preference by clicking the sprocket icon in the top right corner of the data grid. One of the more important column headings is the Group Type. This signifies if you are looking at a Meeting Sales or Tour Lead.

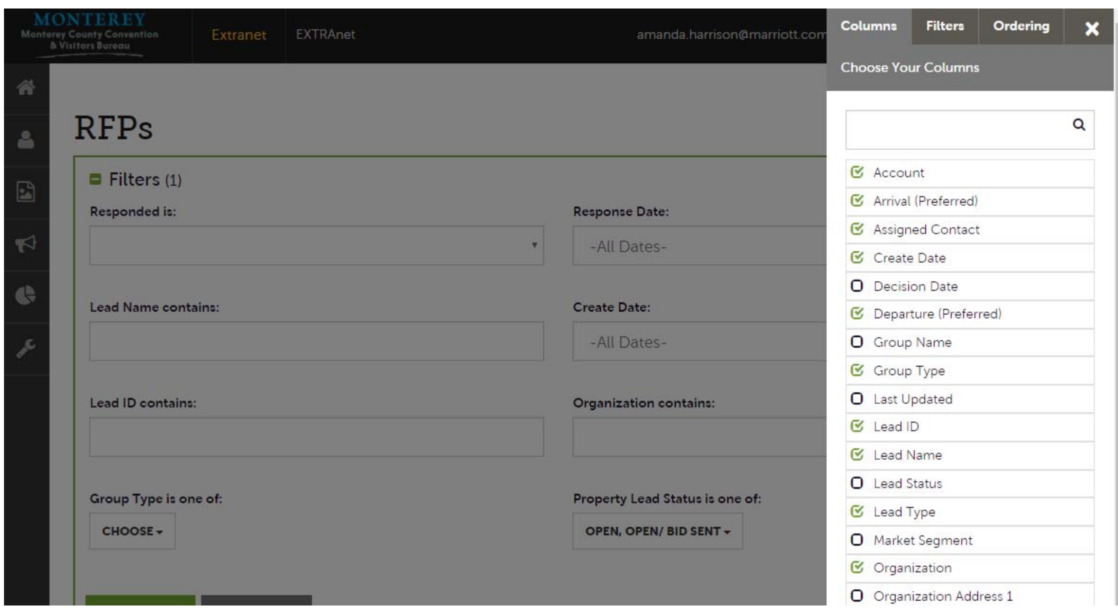
To view a Lead, click on the Eyeball icon or the Lead Name

Opportunities – RFPs (cont'd)

Page 1 of 1 Go to Page: 1

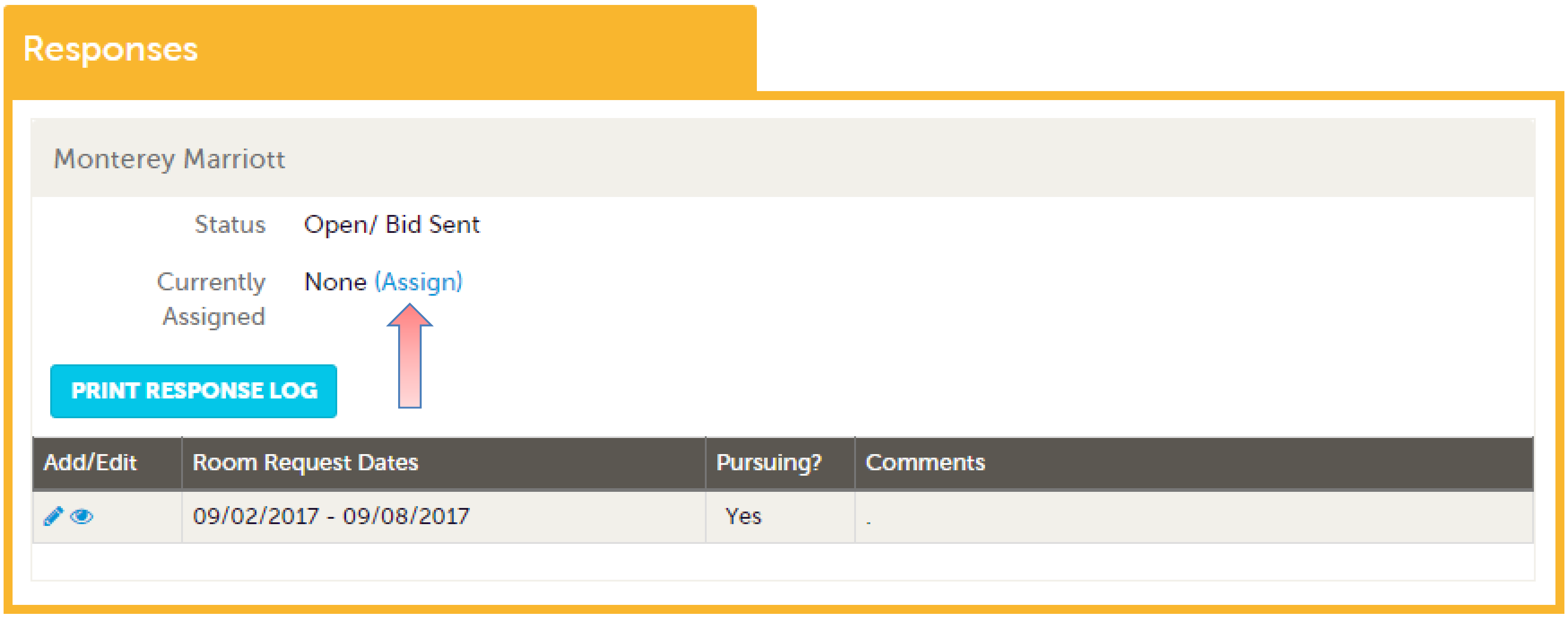
Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016
	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016

For Lead Catchers, click on the Sprocket, and add the column "Assign Contact".

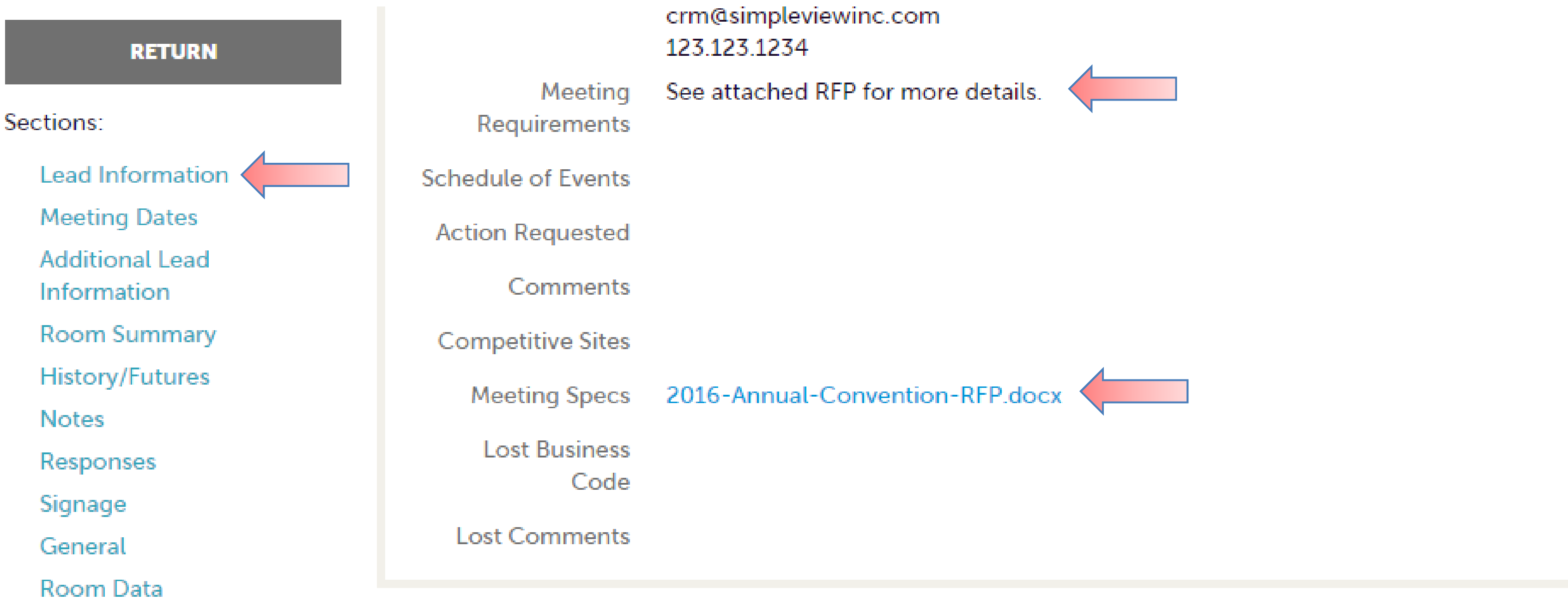


Opportunities – RFPs (cont’d)

For Lead Catchers, you can assign a lead to a sales contact in the “Responses” section.

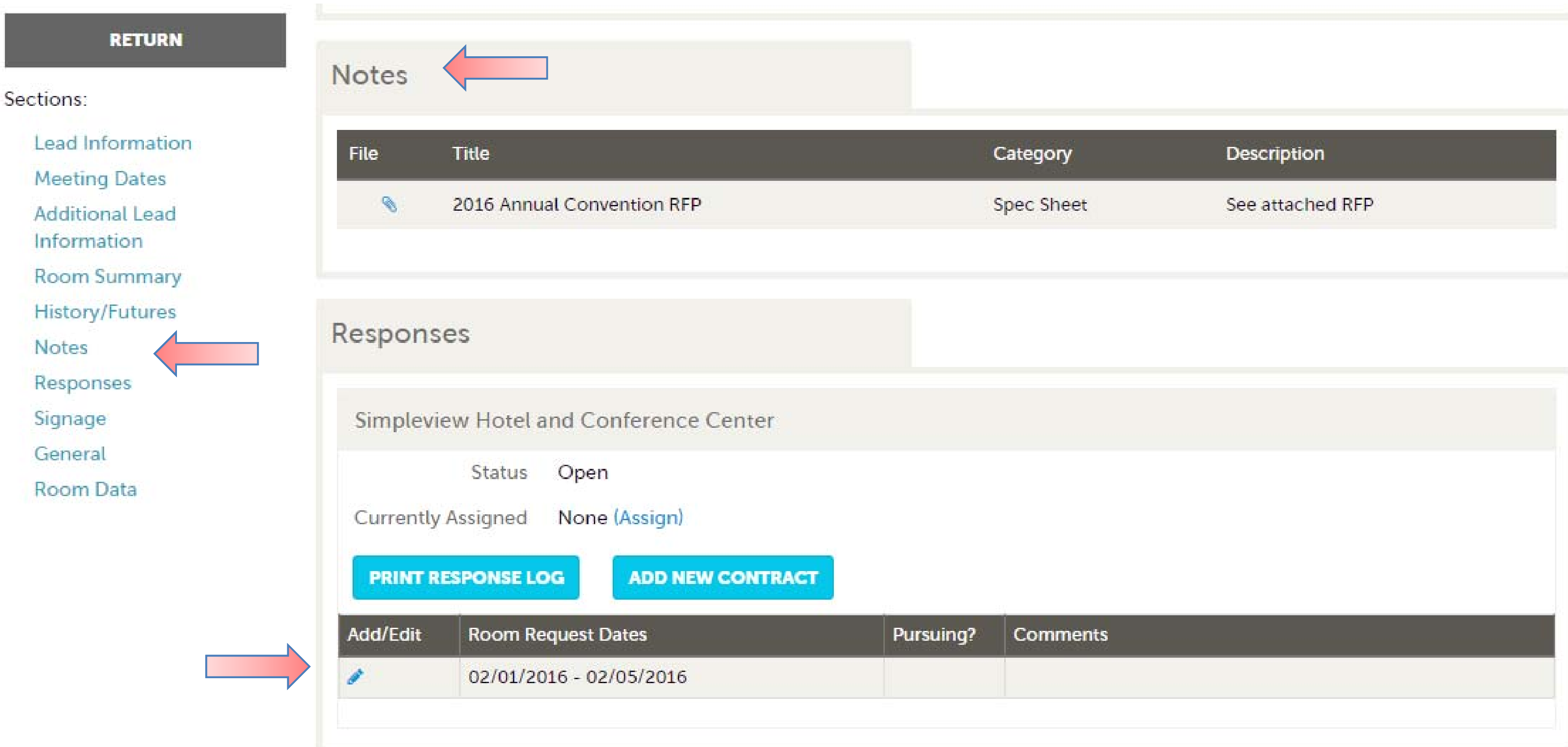


Opportunities – RFPs (cont'd)



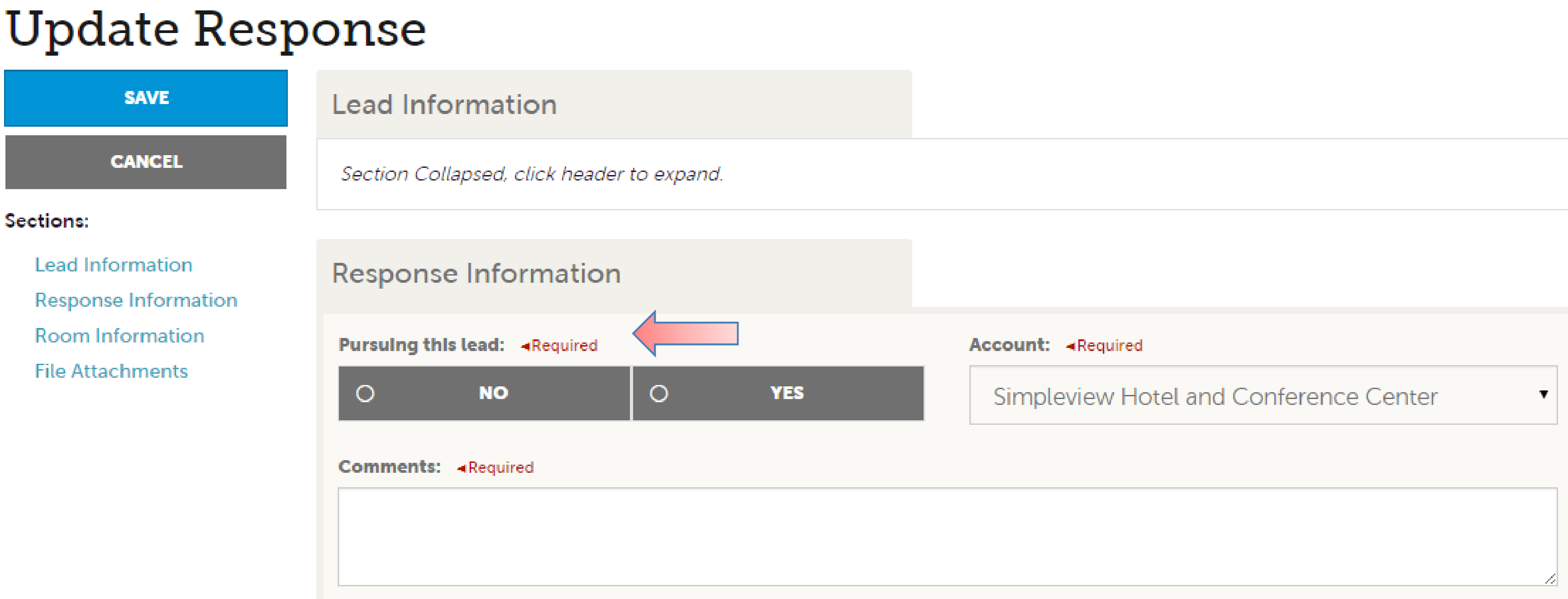
When viewing the Lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in one of two areas: Lead Information and/or Notes section. In the above graphic, this is the Lead section; attachments will be found in the Meeting Specs field. There should be no limit on the file size for attachments. For the Notes section, see next slide.

Opportunities – RFPs (cont'd)



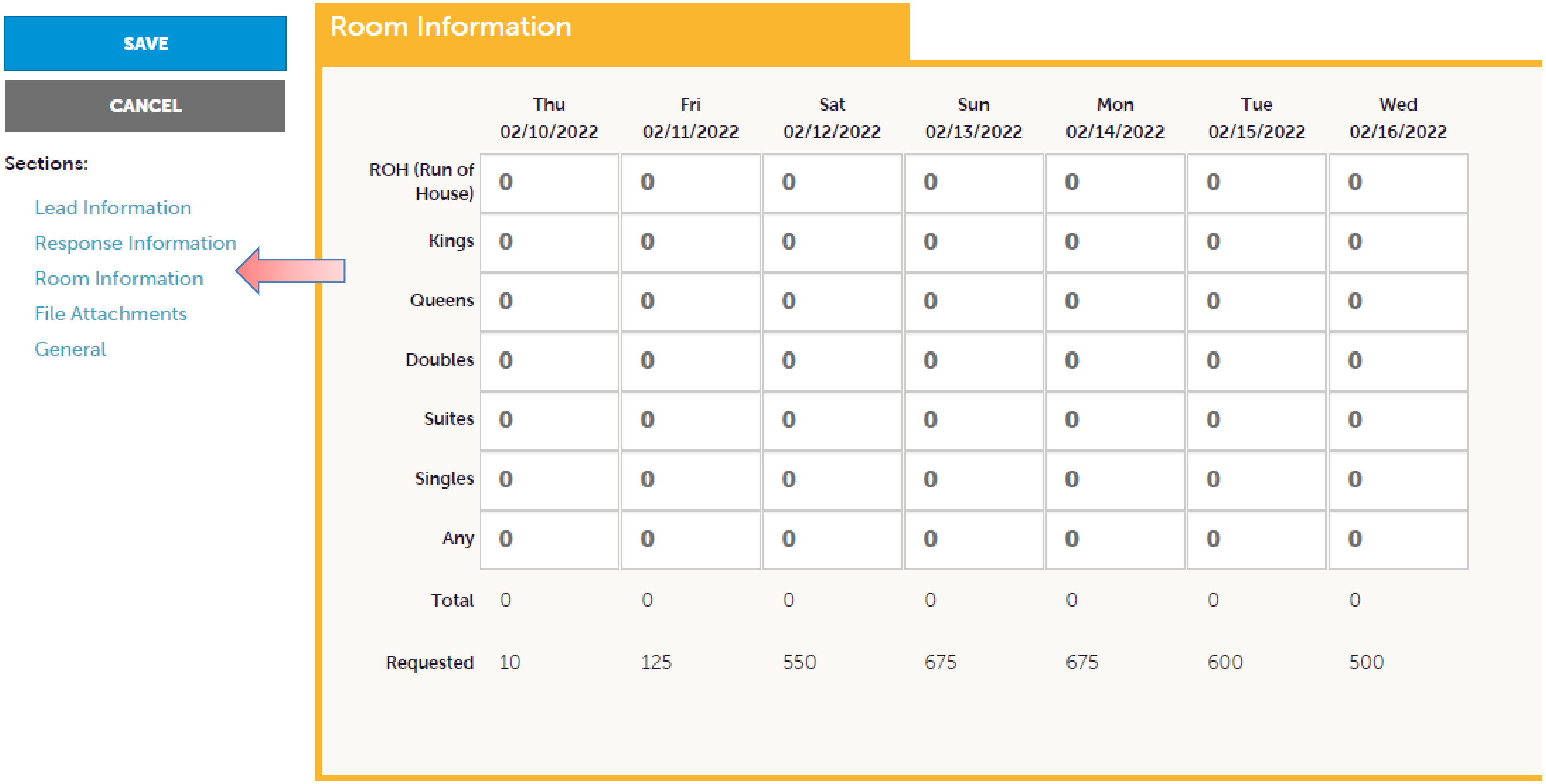
When scrolling to the Notes section, you will see the detailed notes for this piece of business. If an attachment is present, this will be signified with a paperclip icon. After you have reviewed the Lead, scroll to the Responses section. Here you will see options to either add or edit your existing response. Note: these options are not available once the Response Due Date has passed. Click the Add Response button or Pencil icon to enter/edit your response.

Opportunities – RFPs (cont'd)



When adding/editing your response, you will need to tell the Bureau if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option.

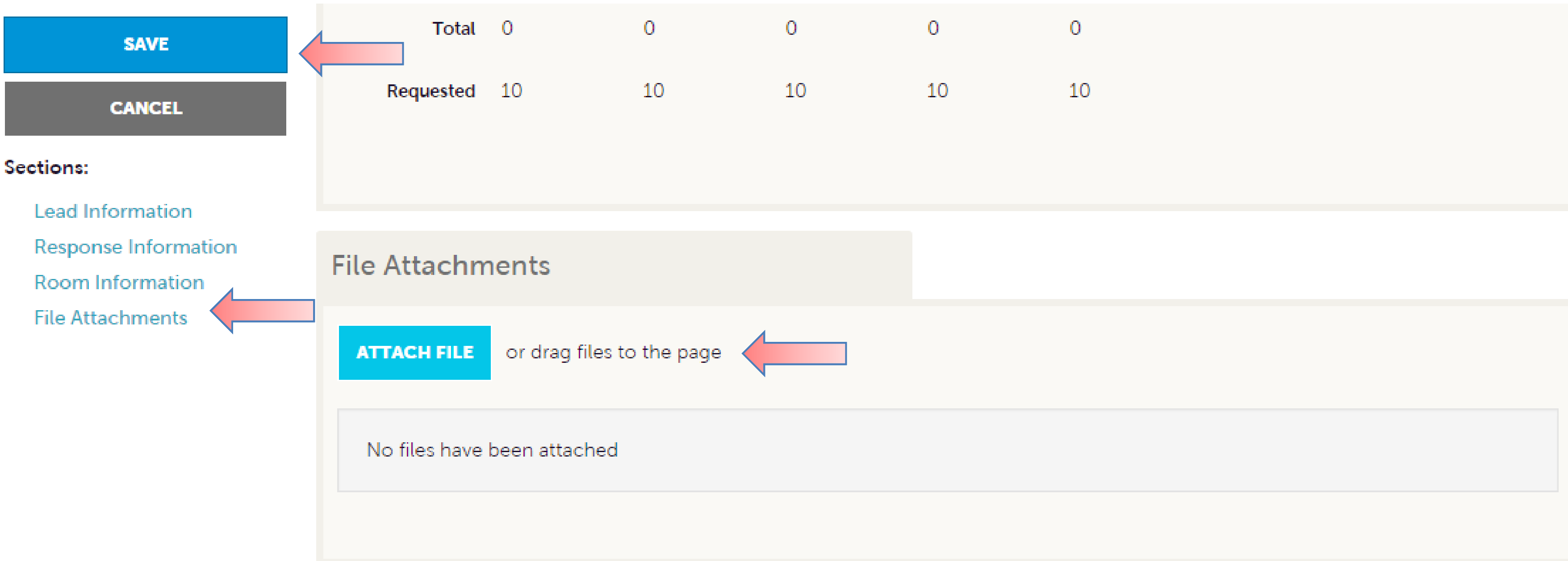
Opportunities – RFPs (cont’d)



	Thu 02/10/2022	Fri 02/11/2022	Sat 02/12/2022	Sun 02/13/2022	Mon 02/14/2022	Tue 02/15/2022	Wed 02/16/2022
ROH (Run of House)	0	0	0	0	0	0	0
Kings	0	0	0	0	0	0	0
Queens	0	0	0	0	0	0	0
Doubles	0	0	0	0	0	0	0
Suites	0	0	0	0	0	0	0
Singles	0	0	0	0	0	0	0
Any	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0
Requested	10	125	550	675	675	600	500

The Room Information section of the response page is where you can enter the number of rooms, by room type, that your property can commit to for this Lead. The first option “ROH” is to be used when the client has their choice of room type.

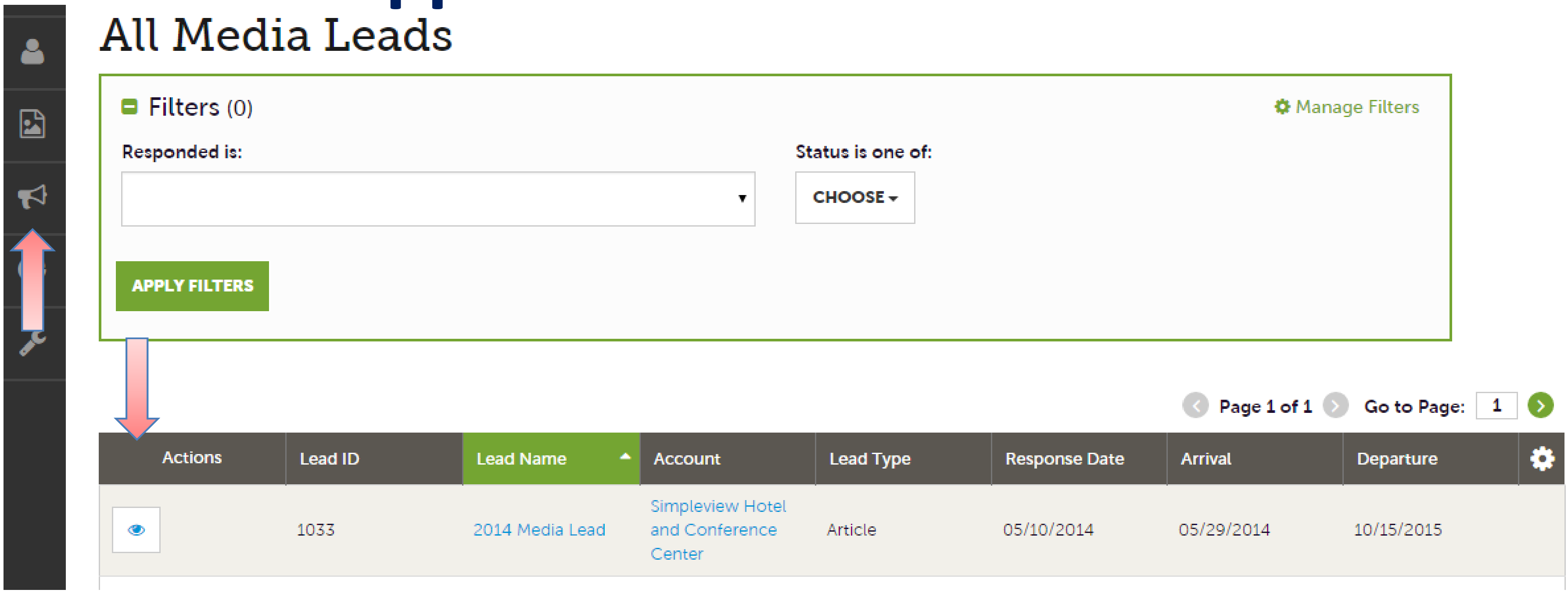
Opportunities – RFPs (cont'd)



To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section.

Once you have finished entering all your response information don't forget to click the save button!

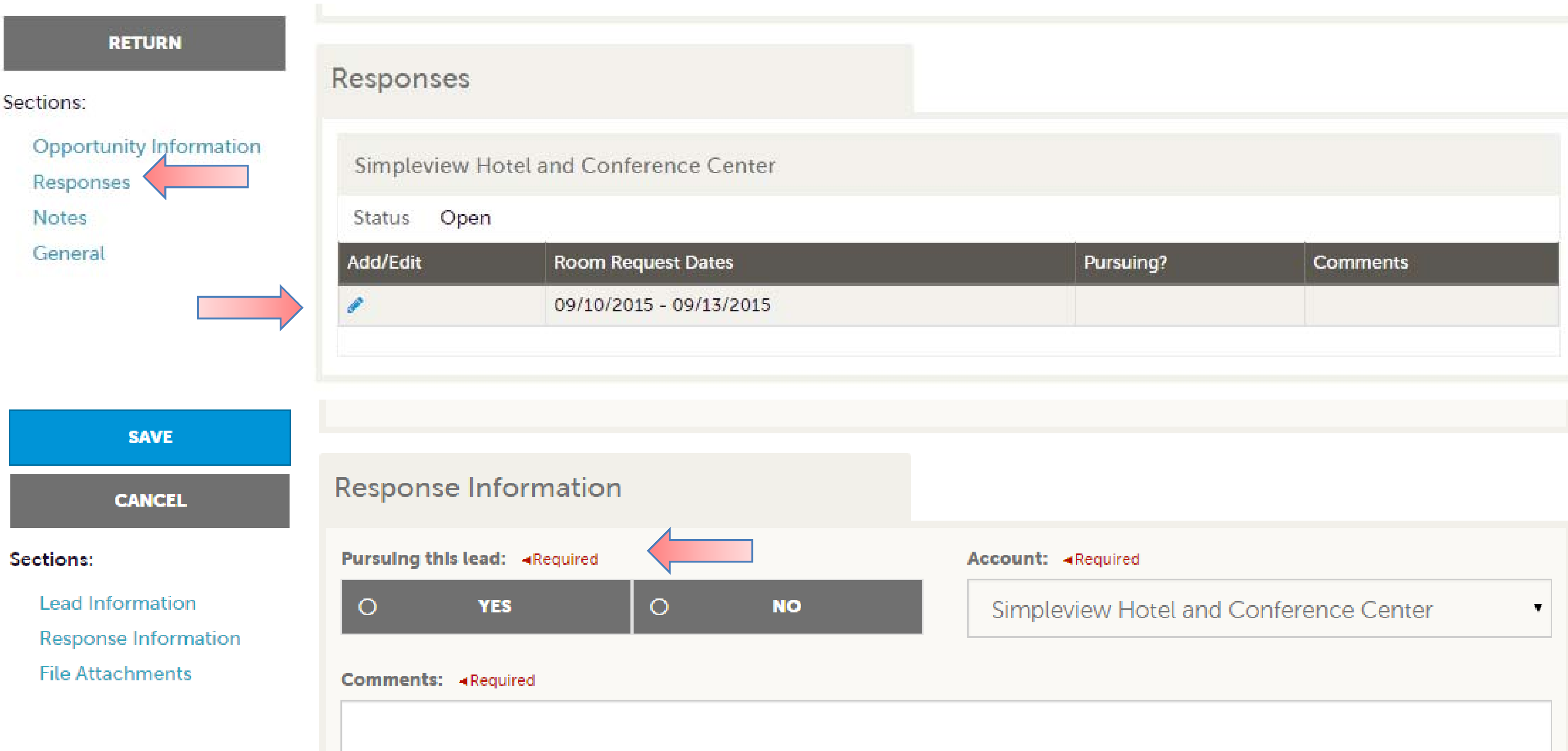
Opportunities – Media Leads



By clicking the RFP icon and then selecting Media Leads, you can view Leads sent to your property by the Bureau's Media/PR department. These are usually requests for hosting travel writers. These Leads can be responded to by viewing the Lead; see next slide for responding.

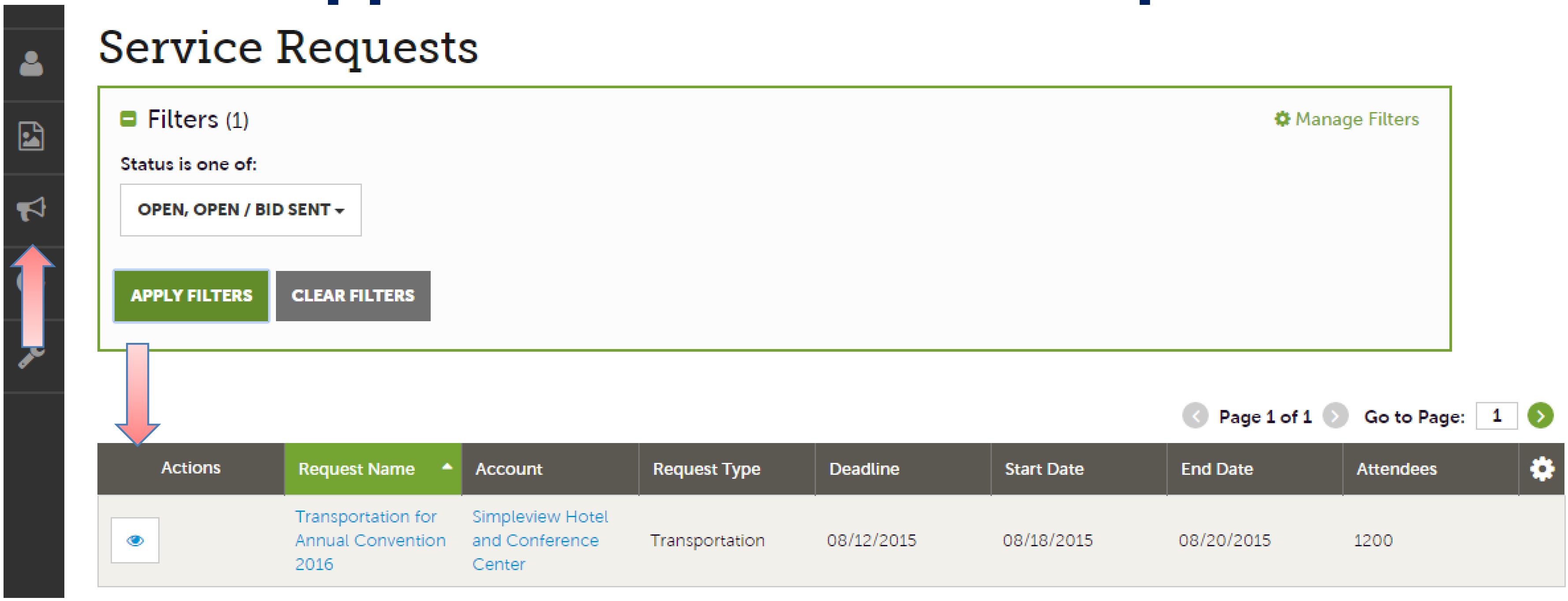
Note: Media Leads function the same as Sales and Tour Leads including their statuses. See Opportunities – RFPs section for more details on this.

Opportunities – Media Leads (cont'd)



As with Sales and Tour Leads you can also respond or edit an existing response to Media Leads by scrolling to the Responses section and clicking the Pencil icon. Within responses you are also able to specify if you are pursuing the business and add attachments.

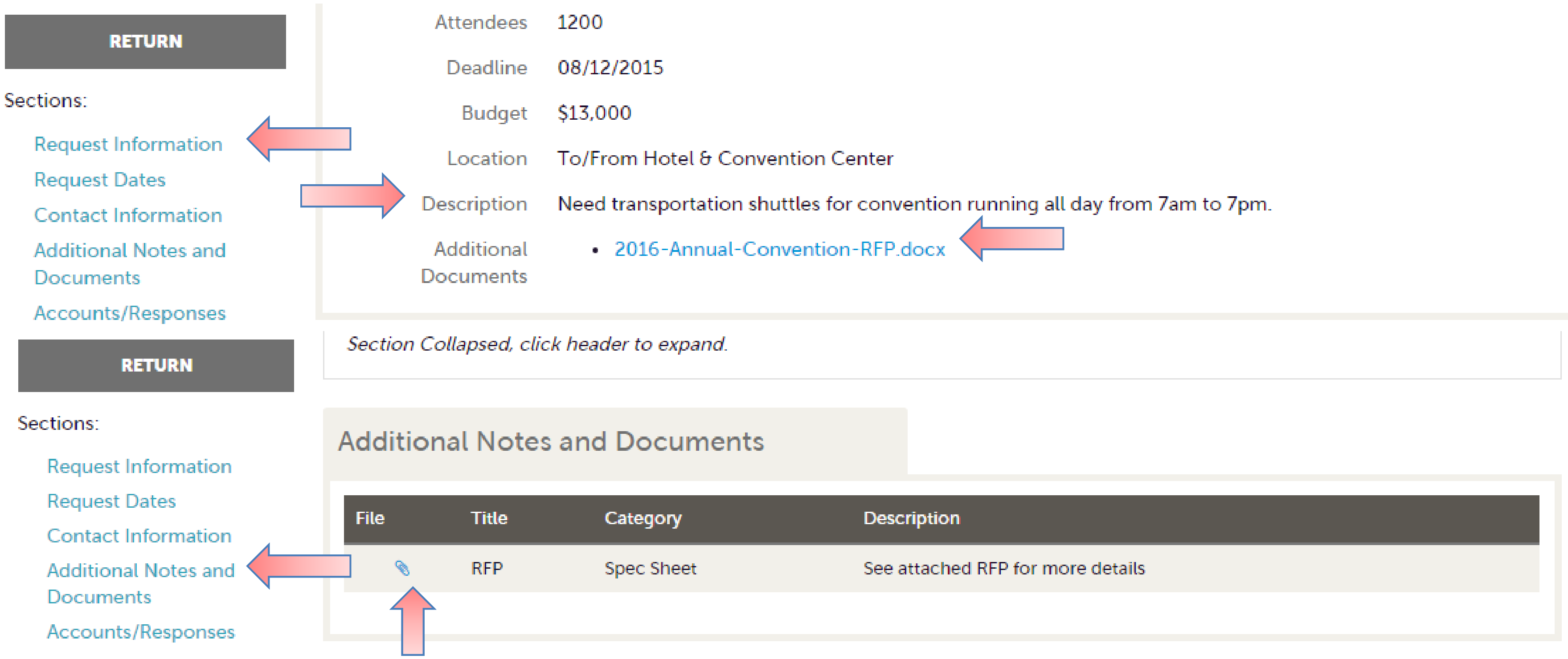
Opportunities – Service Requests



By clicking the RFP icon and then selecting Service Requests, you can view non-room night specific Leads sent to your property. These requests can range from transportation, audio/visual, catering, etc…

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about the service request or click the name of the request.

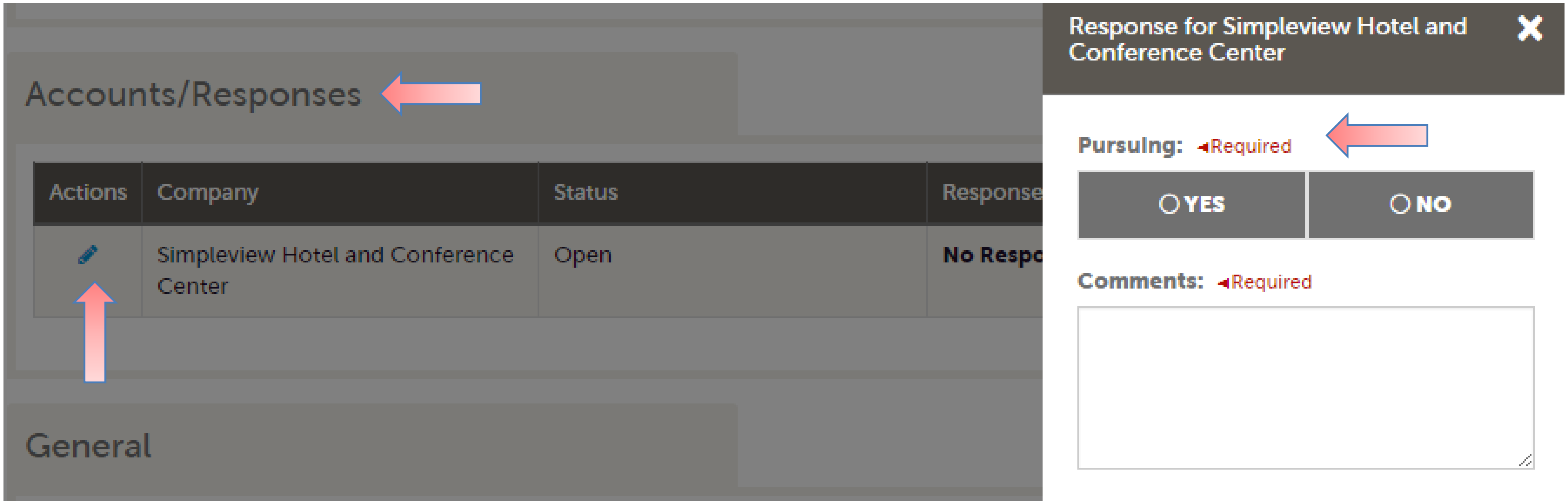
Opportunities – Service Requests (cont'd)



When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads.

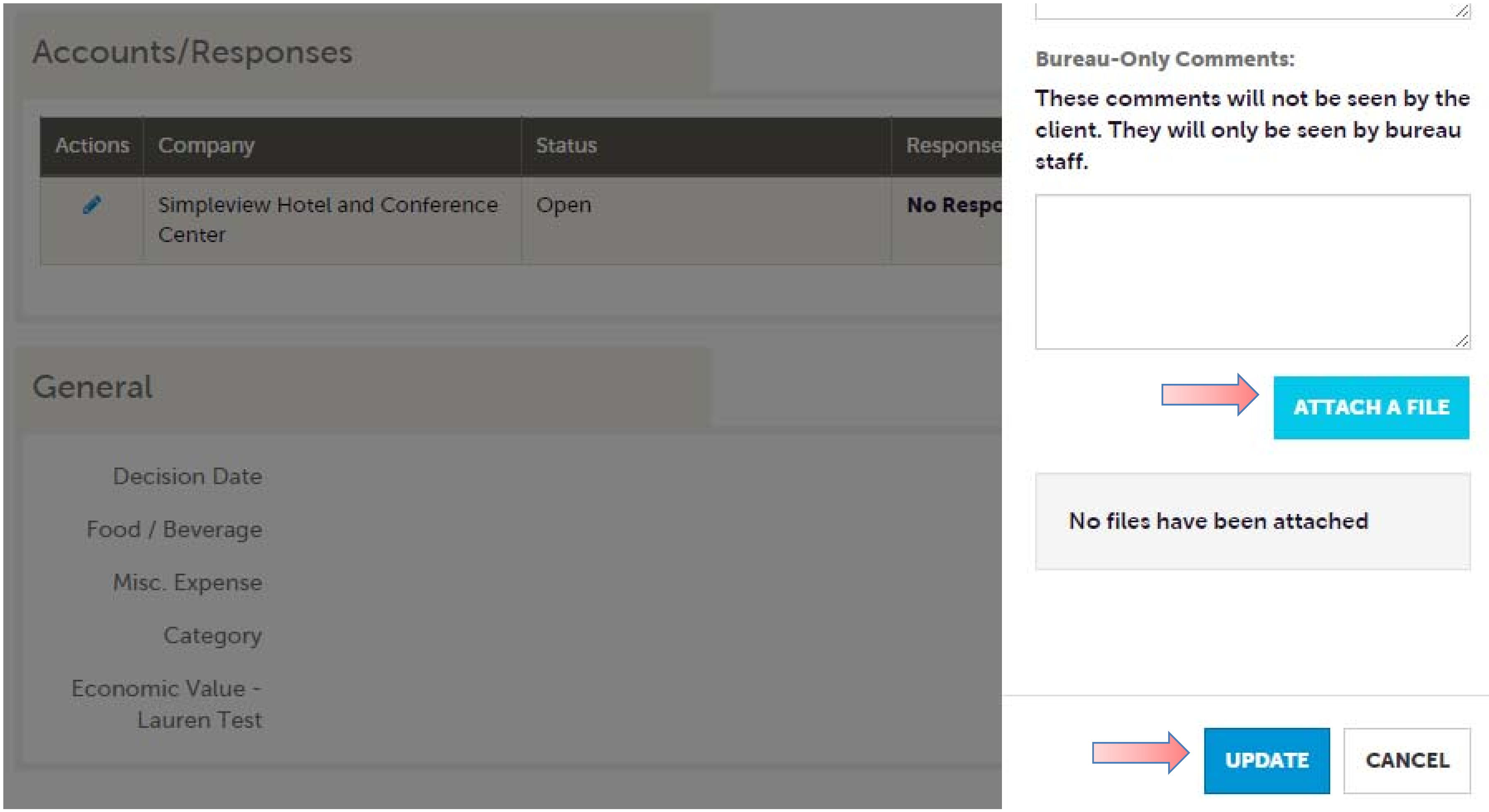
Depending upon the Bureau's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.

Opportunities – Service Requests (cont'd)



If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request. Once clicked, you can tell the Bureau if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.

Opportunities – Service Requests (cont'd)



As you scroll down the response page on the right, you have the ability to attach proposals by clicking Attach File button or click and drag the file from your computer. Be sure to scroll to the button and click the Update button to save your changes!